

Message

From: Clifton, Tony [Clifton.Tony@epa.gov]
Sent: 5/11/2017 2:38:37 PM
To: McDonald, James [McDonald.James@epa.gov]
CC: Hill, Troy [Hill.Troy@epa.gov]; Young, Kendrick [Young.Kendrick@epa.gov]
Subject: VV justification draft
Attachments: R6 Draft VV Justification .docx

Good morning James,

Attached is a draft of the Region's VV justification for your review. Is there a time that we can brief you on the document?

Also, if you are interested, we can provide a breakdown of positions and grades at the Divisional level that are occupied by VERA/VSIP eligible staff. Below is an example of what this breakdown looks like for WQ Division. We can also change the way this data is presented if you need an breakdown by section.

WQ Division Staff	Safe Positions					Target Eligible								Grand Total
	00	13	14	15	Total	07	08	11	12	13	14	Total		
DALLAS,TEXAS	<div>Ex. 5 - Deliberative Process</div>													
ADMINISTRATIVE SPECIALIST														
AQUATIC BIOLOGIST														
DIRECTOR, WATER QUALITY PROTECTION DI														
ENVIRONMENTAL ENGINEER														
ENVIRONMENTAL ENGINEER (LEADER)														
ENVIRONMENTAL PROTECTION ASST														
ENVIRONMENTAL PROTECTION SPECIALIST														
ENVIRONMENTAL SCIENTIST														
GEOLOGIST														
LEAD ENVIRONMENTAL PROTECTION SPC														
LIFE SCIENTIST														
MANAGEMENT & PROG ANALYST														
PHYSICAL SCIENTIST														
PHYSICAL SCIENTIST (ENVIRONMENTAL)														
SECRETARY (OA)														
SUPERVISORY ENVIRON ENGINEER														
SUPERVISORY ENVIRONMENTAL ENGINEER														
SUPERVISORY ENVIRONMENTAL SCIENTIST														
SUPERVISORY LIFE SCIENTIST														
SUPERVISORY PHYSICAL SCIENTIST														
SUPERVISORY PHYSICAL SCIENTIST (ENV)														
SUPV ENVIRONMENTAL PROTECTION SPC														
VISUAL ARTS SPECIALIST														
EL PASO,TEXAS														
ENVIRONMENTAL ENGINEER														
Grand Total														

Tony D. Clifton

Labor & Employee Relations Specialist

US EPA, Region 6

1445 Ross Ave

Dallas, TX 75202

Phone: 214-665-8395

Mobile: Ex. 6 - Personal Privacy

Fax: 214-665-6538

email: Clifton.Tony@epa.gov



Message

From: Clifton, Tony [Clifton.Tony@epa.gov]
Sent: 5/11/2017 1:17:40 PM
To: Hill, Troy [Hill.Troy@epa.gov]
CC: Young, Kendrick [Young.Kendrick@epa.gov]
Subject: VV justification draft
Attachments: R6 VV Justification (Version 2).docx

Draft justification attached.

Once we get an idea of what positions are eligible to be targeted or safe, then we can develop data for you like the chart below. This chart just shows V/V eligible staff by grade and occupation in WQ. We can also change the way this data is presented if you need an organizational breakdown (ie we can break the data down by section).

WQ Division Staff	Safe				Safe Total	Targeted						Targeted Total	Grand Total
	00	13	14	15		07	08	11	12	13	14		
DALLAS, TEXAS													
ADMINISTRATIVE SPECIALIST													
AQUATIC BIOLOGIST													
DIRECTOR, WATER QUALITY PROTECTION DI													
ENVIRONMENTAL ENGINEER													
ENVIRONMENTAL ENGINEER (LEADER)													
ENVIRONMENTAL PROTECTION ASST													
ENVIRONMENTAL PROTECTION SPECIALIST													
ENVIRONMENTAL SCIENTIST													
GEOLOGIST													
LEAD ENVIRONMENTAL PROTECTION SPC													
LIFE SCIENTIST													
MANAGEMENT & PROG ANALYST													
PHYSICAL SCIENTIST													
PHYSICAL SCIENTIST (ENVIRONMENTAL)													
SECRETARY (OA)													
SUPERVISORY ENVIRON ENGINEER													
SUPERVISORY ENVIRONMENTAL ENGINEER													
SUPERVISORY ENVIRONMENTAL SCIENTIST													
SUPERVISORY LIFE SCIENTIST													

Ex. 5 - Deliberative Process

SUPERVISORY PHYSICAL SCIENTIST
SUPERVISORY PHYSICAL SCIENTIST (ENV)
SUPV ENVIRONMENTAL PROTECTION SPC
VISUAL ARTS SPECIALIST
EL PASO, TEXAS
ENVIRONMENTAL ENGINEER
Grand Total

Ex. 5 - Deliberative Process

Tony D. Clifton
Labor & Employee Relations Specialist
US EPA, Region 6
1445 Ross Ave
Dallas, TX 75202
Phone: 214-665-8395
Mobile: Ex. 6 - Personal Privacy
Fax: 214-665-6538
email: Clifton.Tony@epa.gov



Message

From: Clifton, Tony [Clifton.Tony@epa.gov]
Sent: 5/10/2017 7:48:21 PM
To: Hill, Troy [Hill.Troy@epa.gov]
Subject: VV justification
Attachments: R6 VV Justification (Version 2).docx

Attached.

Tony D. Clifton
Labor & Employee Relations Specialist
US EPA, Region 6
1445 Ross Ave
Dallas, TX 75202
Phone: 214-665-8395
Mobile: Ex. 6 - Personal Privacy
Fax: 214-665-6538
email: Clifton.Tony@epa.gov



Message

From: Stenger, Wren [stenger.wren@epa.gov]
Sent: 5/10/2017 5:38:43 PM
To: McDonald, James [McDonald.James@epa.gov]; Blanco, Arturo [Blanco.Arturo@epa.gov]; Coleman, Sam [Coleman.Sam@epa.gov]; Edlund, Carl [Edlund.Carl@epa.gov]; Gray, David [gray.david@epa.gov]; Honker, William [honker.william@epa.gov]; Payne, James [payne.james@epa.gov]; Seager, Cheryl [Seager.Cheryl@epa.gov]; R6 Deputy Division Directors [R6_Deputy_Division_Directors@epa.gov]
Subject: RE: Consolidation Ideas
Attachments: VERA VISIP FY2017 POST restructuring options wren edit May 10 2017.docx

I added another option on page 4 under **Proposal for Administrative Officer (AO)/Funds control staff consolidation.**

From: McDonald, James
Sent: Wednesday, May 10, 2017 7:59 AM
To: Blanco, Arturo <Blanco.Arturo@epa.gov>; Coleman, Sam <Coleman.Sam@epa.gov>; Edlund, Carl <Edlund.Carl@epa.gov>; Gray, David <gray.david@epa.gov>; Honker, William <honker.william@epa.gov>; Payne, James <payne.james@epa.gov>; Seager, Cheryl <Seager.Cheryl@epa.gov>; Stenger, Wren <stenger.wren@epa.gov>; R6 Deputy Division Directors <R6_Deputy_Division_Directors@epa.gov>
Subject: Consolidation Ideas

Colleagues,

Attached the summary of options that you presented regarding consolidation of regional programs and activities. Please take a look at this document and be prepared to discuss further at our next meeting.

Regards,

James McDonald
Assistant Regional Administrator
U.S. Environmental Protection Agency
Region 6
214-665-6500
214-665-8072 (fax)
mcdonald.james@epa.gov



Message

From: McDonald, James [McDonald.James@epa.gov]
Sent: 5/10/2017 12:58:51 PM
To: Blanco, Arturo [Blanco.Arturo@epa.gov]; Coleman, Sam [Coleman.Sam@epa.gov]; Edlund, Carl [Edlund.Carl@epa.gov]; Gray, David [gray.david@epa.gov]; Honker, William [honker.william@epa.gov]; Payne, James [payne.james@epa.gov]; Seager, Cheryl [Seager.Cheryl@epa.gov]; Stenger, Wren [stenger.wren@epa.gov]; R6 Deputy Division Directors [R6_Deputy_Division_Directors@epa.gov]
Subject: Consolidation Ideas
Attachments: R6restructuring options.docx

Colleagues,

Attached the summary of options that you presented regarding consolidation of regional programs and activities. Please take a look at this document and be prepared to discuss further at our next meeting.

Regards,

James McDonald
Assistant Regional Administrator
U.S. Environmental Protection Agency
Region 6
214-665-6500
214-665-8072 (fax)
mcdonald.james@epa.gov




Message

From: Clifton, Tony [Clifton.Tony@epa.gov]
Sent: 5/9/2017 8:07:21 PM
To: Hill, Troy [Hill.Troy@epa.gov]
CC: Young, Kendrick [Young.Kendrick@epa.gov]
Subject: draft email to DRA

<!--[if lte mso 15 || CheckWebRef]-->

Clifton, Tony has shared a OneDrive for Business file with you. To view it, click the link below.

 R6 Workforce Numbers.xlsx

<!--[endif]-->

Hi Troy,

Below is an initial draft email to Sam based on our discussion this afternoon. Perhaps we can include in the compiled chart a column that reflects the Director's input (in other words, any positions not deemed safe would be available for VV). I also made some changes to some of the numbers in our chart.

Ex. 5 - Deliberative Process

Tony D. Clifton
Labor & Employee Relations Specialist
US EPA, Region 6
1445 Ross Ave
Dallas, TX 75202
Phone: 214-665-8395
Mobile: Ex. 6 - Personal Privacy

Fax: 214-665-6538
email: Clifton.Tony@epa.gov



Message

From: Young, Kendrick [Young.Kendrick@epa.gov]
Sent: 4/11/2018 2:01:14 PM
To: Hill, Troy [Hill.Troy@epa.gov]
CC: Clifton, Tony [Clifton.Tony@epa.gov]
Subject: FW: latest draft
Attachments: R6 VV Justification (w-Budget Tables) 3-23-18.docx

Attached is the draft with the supervisory language added. If you have any questions, please let us know.

Kendrick Young
Human Resources Specialist
US E.P.A, Region 6
Management Division
Phone: 214-665-7466
Email: young.kendrick@epa.gov

From: Clifton, Tony
Sent: Monday, April 09, 2018 1:05 PM
To: Young, Kendrick <Young.Kendrick@epa.gov>
Subject: RE: latest draft

Here is the draft with the supervisory language added for your review. After you review and edit it, can you please send it to Troy?

Tony D. Clifton
Labor & Employee Relations Specialist
US EPA, Region 6
1445 Ross Ave
Dallas, TX 75202
Phone: 214-665-8395
Mobile: Ex. 6 - Personal Privacy
Fax: 214-665-6538
email: Clifton.Tony@epa.gov



From: Hill, Troy
Sent: Monday, April 09, 2018 7:30 AM
To: Clifton, Tony <Clifton.Tony@epa.gov>
Cc: Young, Kendrick <Young.Kendrick@epa.gov>
Subject: latest draft

Troy Hill
Management Division
EPA Region 6
214-665-6647
Hill.Troy@epa.gov



Message

From: Clifton, Tony [Clifton.Tony@epa.gov]
Sent: 3/22/2018 6:18:07 PM
To: Hill, Troy [Hill.Troy@epa.gov]
CC: Young, Kendrick [Young.Kendrick@epa.gov]
Subject: RE: Draft V/V Document
Attachments: R6 VV Justification (w-Budget Tables) 3-19-18 (002).docx

Attached is the draft. Kendrick also took a look and added some comments. Let me know what else I can do to help.

Tony D. Clifton
Labor & Employee Relations Specialist
US EPA, Region 6
1445 Ross Ave
Dallas, TX 75202
Phone: 214-665-8395
Mobile: Ex. 6 - Personal Privacy
Fax: 214-665-6538
email: Clifton.Tony@epa.gov



From: Hill, Troy
Sent: Thursday, March 22, 2018 8:39 AM
To: Clifton, Tony <Clifton.Tony@epa.gov>
Cc: Young, Kendrick <Young.Kendrick@epa.gov>
Subject: Draft V/V Document

Tony,

Can you please review to make sure it all makes sense.

Thank you

Troy Hill
Management Division
EPA Region 6
214-665-6647
Hill.Troy@epa.gov



Message

From: Clifton, Tony [Clifton.Tony@epa.gov]
Sent: 5/21/2018 7:44:47 PM
To: Hill, Troy [Hill.Troy@epa.gov]
Subject: RE: 30 Max V/V
Attachments: R6 VV Justification max 30 (w-Budget Tables) 5-21-18.docx

Edits and comments attached.

Tony D. Clifton
Labor & Employee Relations Specialist
US EPA, Region 6
1445 Ross Ave
Dallas, TX 75202
Phone: 214-665-8395
Mobile: Ex. 6 - Personal Privacy
Fax: 214-665-6538
email: Clifton.Tony@epa.gov



From: Hill, Troy
Sent: Monday, May 21, 2018 2:13 PM
To: Clifton, Tony <Clifton.Tony@epa.gov>
Subject: 30 Max V/V

Troy Hill
Management Division
EPA Region 6
214-665-6647
Hill.Troy@epa.gov



Message

From: Bonnell, Corey [bonnell.corey@epa.gov]
Sent: 5/17/2018 8:22:48 PM
To: Hill, Troy [Hill.Troy@epa.gov]; McDonald, James [McDonald.James@epa.gov]
Subject: FW: Updated V/V document
Attachments: R6 VV Justification 1b (w-Budget Tables) 5-15-18.docx

Gentlemen:

The budget section has run a payroll projection and determined the maximum number of offers that can be made on a Region V/V is Ex. 5 - Deliberative Process

This calculation was done with a maximum LSL payout of 240 hours.

FYI: Our accounting staff are commencing reallocations and charging changes to accommodate the requirement. These efforts will continue through the execution of the buyout to avoid defacto labor accounts.

VRS

Corey
Corey K Bonnell
Comptroller
EPA Region 6
Dallas, TX
Office 214.665.7432
Cell Ex. 6 - Personal Privacy

From: Hill, Troy
Sent: Wednesday, May 16, 2018 3:09 PM
To: McDonald, James <McDonald.James@epa.gov>; Clifton, Tony <Clifton.Tony@epa.gov>; Young, Kendrick <Young.Kendrick@epa.gov>
Cc: Bonnell, Corey <bonnell.corey@epa.gov>
Subject: Updated V/V document

With updated budget info -

Troy Hill
Management Division
EPA Region 6
214-665-6647
Hill.Troy@epa.gov



Message

From: Clifton, Tony [Clifton.Tony@epa.gov]
Sent: 5/15/2018 7:15:25 PM
To: Hill, Troy [Hill.Troy@epa.gov]
Subject: RE: V/V draft 5/15
Attachments: R6 VV Justification (w-Budget Tables) 5-15-18.docx

Hey Troy,

For some reason the version I sent you didn't have the updated budget numbers (I guess I forgot to save before I sent it). Attached is that version. I did not see all the info in the budget section so I plugged in what I could.

Tony D. Clifton
Labor & Employee Relations Specialist
US EPA, Region 6
1445 Ross Ave
Dallas, TX 75202
Phone: 214-665-8395
Mobile: Ex. 6 - Personal Privacy
Fax: 214-665-6538
email: Clifton.Tony@epa.gov



From: Hill, Troy
Sent: Tuesday, May 15, 2018 1:58 PM
To: McDonald, James <McDonald.James@epa.gov>
Cc: Clifton, Tony <Clifton.Tony@epa.gov>; Young, Kendrick <Young.Kendrick@epa.gov>; Bonnell, Corey <bonnell.corey@epa.gov>
Subject: V/V draft 5/15

This version does not include any attorney and financial positions. The financial information has been updated based on input from Corey.

Message

From: Clifton, Tony [Clifton.Tony@epa.gov]
Sent: 5/15/2018 6:35:58 PM
To: Hill, Troy [Hill.Troy@epa.gov]
CC: Young, Kendrick [Young.Kendrick@epa.gov]
Subject: VV Draft 5-15-18
Attachments: VV Numbers 5-14-18.pdf; R6 VV Justification (w-Budget Tables) 5-15-18.docx

Tony D. Clifton
Labor & Employee Relations Specialist
US EPA, Region 6
1445 Ross Ave
Dallas, TX 75202
Phone: 214-665-8395
Mobile: Ex. 6 - Personal Privacy
Fax: 214-665-6538
email: Clifton.Tony@epa.gov



Message

From: Clifton, Tony [Clifton.Tony@epa.gov]
Sent: 5/30/2018 1:22:19 PM
To: Hill, Troy [Hill.Troy@epa.gov]
Subject: Edits to talking points and business case
Attachments: FY18 VV Talking Points.docx; R6 VV Justification 1b (w-Budget Tables) 5-25-18.docx

I added HQs comments in the talking points. I also added "tie breaker language" to business case. I'll print out new copies.

Tony D. Clifton
Labor & Employee Relations Specialist
US EPA, Region 6
1445 Ross Ave
Dallas, TX 75202
Phone: 214-665-8395
Mobile: Ex. 6 - Personal Privacy
Fax: 214-665-6538
email: Clifton.Tony@epa.gov



V/V Talking Points

Comments from HQs:

- Business case should target positions being as specific as possible.
 - We used the Division level to facilitate a broad V/V offering.
- Business case must address previous V/V offering and why we are doing it again using the same themes.
 - Our Rationale: We made headway with previous V/V offering but themes such as consolidation are still appropriate.
- Business case must be specific about how the Region will address work post-V/V.
 - Our Rationale: Work will be reassigned and reprioritized.
- Business case must address V/V application “tie-breakers”
 - We used the same method as previously (SDC for leave, EOD at EPA, then application timing)

R6 FY18 V/V Draft Specifics:

- Targeted over 300 positions
 - Based on series, grade, geographic location, and division
 - Positions are in Dallas, Houston, and El Paso
- Identified 91 maximum offers by making at least 1 offer in each targeted position category
 - Historically, 30% of all offers were accepted. We estimate about 30 accepted offers.
- No attorneys were targeted
 - This is because of the use of a standardized PD that does not permit restructuring (only eliminate) positions
- FY19 savings would be approximately \$800k

Message

From: Clifton, Tony [Clifton.Tony@epa.gov]
Sent: 5/30/2018 12:49:58 PM
To: Hill, Troy [Hill.Troy@epa.gov]
Subject: R6 VV Justification 1b (w-Budget Tables) 5-25-18.docx
Attachments: R6 VV Justification 1b (w-Budget Tables) 5-25-18.docx

Attached.

Message

From: Clifton, Tony [Clifton.Tony@epa.gov]
Sent: 5/29/2018 7:48:43 PM
To: Hill, Troy [Hill.Troy@epa.gov]
Subject: V/V Justification Draft
Attachments: R6 VV Justification 1b (w-Budget Tables) 5-25-18.docx; VV Spreadsheet.xlsx

Tony D. Clifton
Labor & Employee Relations Specialist
US EPA, Region 6
1445 Ross Ave
Dallas, TX 75202
Phone: 214-665-8395
Mobile: Ex. 6 - Personal Privacy
Fax: 214-665-6538
email: Clifton.Tony@epa.gov



Message

From: Hill, Troy [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=42EC80F65FB64BF8958D43F22F69B337-HILL, TROY]
Sent: 4/11/2018 4:05:02 PM
To: Young, Kendrick [Young.Kendrick@epa.gov]; Clifton, Tony [Clifton.Tony@epa.gov]
Subject: FW: VERA/VSIP Templates
Attachments: R6 VV Justification (w-Budget Tables) 4-11-18.docx

FYI

From: Hill, Troy
Sent: Wednesday, April 11, 2018 11:05 AM
To: Bonner, Jerome <Bonner.Jerome@epa.gov>; Jones, Sara <jones.sara@epa.gov>
Cc: McDonald, James <McDonald.James@epa.gov>
Subject: VERA/VSIP Templates

Jerome and Sara,

Attached is a draft of the V/V package that Region 6 is working on for 2018. A decision was made this week to include supervisory positions. We would like to set up a call to discuss this and also discuss the pros and cons of identifying safe positions.

Regards

Troy

From: Bonner, Jerome
Sent: Monday, April 02, 2018 3:40 PM
To: Jones, Sara <jones.sara@epa.gov>
Cc: Hill, Troy <Hill.Troy@epa.gov>
Subject: FW: VERA/VSIP Templates

Sara,

Please requests that we discuss V/V plans w/ R6. We should be looking for potential concerns; such as ability to restructure or other position management concerns that may not fall within the SSC's purview.

Thanks

JB

Jerome W. Bonner
Environmental Protection Agency
Office of Administration and Resources Management - Cincinnati
Director, Human Resources
Cincinnati Human Resources Shared Service Center
Tel: 513.569.7950
Mobile: Ex. 6 - Personal Privacy

CONFIDENTIALITY: This communication may contain privileged or other confidential information. If you are not the intended addressee, or believe you have received this communication in error, you may neither copy, disseminate, nor distribute it to anyone else or use it in any unauthorized

manner; to do so is strictly prohibited and may be unlawful. If you receive this email by mistake, please advise the sender immediately by using the reply facility in your mail software and delete it from your computer. "Information in this message may be subject to the Privacy Act (5 USC 552a) and should be treated accordingly."

From: Hunt, Loretta

Sent: Monday, April 02, 2018 3:18 PM

To: Hart, Debbi <Hart.Debbi@epa.gov>; Gray, David <gray.david@epa.gov>; Lane, Vicki <Lane.Vicki@epa.gov>; Lattimore, Kraig <lattimore.kraig@epa.gov>; Maher, Karen <Maher.Karen@epa.gov>; McClendon, Michelle <McClendon.Michelle@epa.gov>; Bonner, Jerome <Bonner.Jerome@epa.gov>; Young, Debbie <young.debbie@epa.gov>; Jones, Sara <jones.sara@epa.gov>; Jimenez, Elaine <Jimenez.Elaine@epa.gov>; Burt, Cynthia <Burt.Cynthia@epa.gov>; Davis, Cathy <Davis.Cathy@epa.gov>

Cc: Willig, Jeanine <willig.jeanine@epa.gov>; Martinez, Doris <Martinez.Doris@epa.gov>; Taylor, Jeremy <Taylor.Jeremy@epa.gov>; Engebretson, Lizabeth <Engebretson.Lizabeth@epa.gov>; Krift, Cheryl <Krift.Cheryl@epa.gov>; Hampton, Torrey <hampton.torrey@epa.gov>; Schulman, Marvin <Schulman.Marvin@epa.gov>; McNeal, Detha <McNeal.Detha@epa.gov>; Martinez, Gwendolyn <Martinez.Gwendolyn@epa.gov>; Lee, Terry <lee.terry@epa.gov>; Atkinson, Ryan <Atkinson.Ryan@epa.gov>; Remmers, Janet <Remmers.Janet@epa.gov>

Subject: RE: VERA/VSIP Templates

Everyone, to supplement the templates, the Workforce Planning Branch has pulled data for each organization as follows:

- Current permanent employees onboard;
- Optional retirement eligible employees;
- VERA eligibles; and
- VSIP eligibles.

The WPB ran the same type of report for previous VERA/VSIP offerings.

If you have any questions about the data, please contact Michelle McClendon at mcclendon.michelle@epa.gov or (202) 564-3150.

Loretta L. Hunt
Branch Chief
Policy and Accountability Branch
Policy, Planning and Training Division
Office of Human Resources
U.S. EPA
Phone: (202) 564-6963
Email: hunt.loretta@epa.gov

From: Hunt, Loretta

Sent: Thursday, March 29, 2018 7:06 PM

To: Hart, Debbi <Hart.Debbi@epa.gov>; Gray, David <gray.david@epa.gov>; Lane, Vicki <Lane.Vicki@epa.gov>; Lattimore, Kraig <lattimore.kraig@epa.gov>; Maher, Karen <Maher.Karen@epa.gov>; Vaughan, Pat <Vaughan.Pat@epa.gov>; McClendon, Michelle <McClendon.Michelle@epa.gov>; Bonner, Jerome <Bonner.Jerome@epa.gov>; Young, Debbie <young.debbie@epa.gov>; Jones, Sara <jones.sara@epa.gov>; Jimenez, Elaine <Jimenez.Elaine@epa.gov>; Burt, Cynthia <Burt.Cynthia@epa.gov>; Davis, Cathy <Davis.Cathy@epa.gov>

Cc: Willig, Jeanine <willig.jeanine@epa.gov>; Martinez, Doris <Martinez.Doris@epa.gov>; Taylor, Jeremy

<Taylor.Jeremy@epa.gov>; Engebretson, Lizabeth <Engebretson.Lizabeth@epa.gov>; Krift, Cheryl <Krift.Cheryl@epa.gov>; Kanet, Audrey <kanet.audrey@epa.gov>; Hampton, Torrey <hampton.torrey@epa.gov>; Schulman, Marvin <Schulman.Marvin@epa.gov>; McNeal, Detha <McNeal.Detha@epa.gov>; Martinez, Gwendolyn <Martinez.Gwendolyn@epa.gov>; Lee, Terry <lee.terry@epa.gov>; Ryan Atkinson <Atkinson.Ryan@epa.gov>; Remmers, Janet <Remmers.Janet@epa.gov>

Subject: VERA/VSIP Templates

Everyone,

This is a follow-up to last week's VERA/VSIP briefing. As promised, I am sending you the following templates:

1. Business case
2. Targeted positions and costs

In re: to the "costs" tab in the spreadsheet, offices will need to fill in the boxes that are highlighted in yellow. There are formulas in the spreadsheet to do the math calculations.

Please discuss your business case and targeted positions with your servicing SSC. If you have any general questions about VERA/VSIP, contact me or Debbi. If you have questions about budget/costs, please reach out to Janet Remmers (remmers.janet@epa.gov).

Thanks.

Loretta L. Hunt
Branch Chief
Policy and Accountability Branch
Policy, Planning and Training Division
Office of Human Resources
U.S. EPA
Phone: (202) 564-6963
Email: hunt.loretta@epa.gov

Message

From: Hill, Troy [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=42EC80F65FB64BF8958D43F22F69B337-HILL, TROY]
Sent: 4/9/2018 12:29:31 PM
To: Clifton, Tony [Clifton.Tony@epa.gov]
CC: Young, Kendrick [Young.Kendrick@epa.gov]
Subject: latest draft
Attachments: R6 VV Justification (w-Budget Tables) 3-23-18 (002).docx

Troy Hill
Management Division
EPA Region 6
214-665-6647
Hill.Troy@epa.gov



Message

From: Hill, Troy [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=42EC80F65FB64BF8958D43F22F69B337-HILL, TROY]
Sent: 3/22/2018 1:39:23 PM
To: Clifton, Tony [Clifton.Tony@epa.gov]
CC: Young, Kendrick [Young.Kendrick@epa.gov]
Subject: Draft V/V Document
Attachments: R6 VV Justification (w-Budget Tables) 3-19-18.docx

Tony,

Can you please review to make sure it all makes sense.

Thank you

Troy Hill
Management Division
EPA Region 6
214-665-6647
Hill.Troy@epa.gov



From: Hill, Troy [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=42EC80F65FB64BF8958D43F22F69B337-HILL, TROY]
Sent: 3/2/2018 5:02:12 PM
To: McDonald, James [McDonald.James@epa.gov]
Subject: 2017 V/V Themes for Region 6

Region 6 2017 VERA/VSIP Themes

Ex. 5 - Deliberative Process

1. Delaying.

Ex. 5 - Deliberative Process

2. Consolidate or reduce administrative functions.

Ex. 5 - Deliberative Process

3. Restructure and reduce highly graded supervisory and non-supervisory positions.

^[1] Unless otherwise indicated, a targeted position includes Lead positions.

Targeted 1301 positions are intended to include all titles within that occupational series.

Ex. 5 - Deliberative Process

4. Restructure to focus on core business functions.

Ex. 5 - Deliberative Process

5. Restructure to focus on STEM/programmatic priorities

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

6. Consolidate and streamline functions/activities/reduce number of programs

Ex. 5 - Deliberative Process

Troy Hill
Management Division
EPA Region 6
214-665-6647
Hill.Troy@epa.gov



Message

From: Hill, Troy [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=42EC80F65FB64BF8958D43F22F69B337-HILL, TROY]
Sent: 8/1/2017 5:36:55 PM
To: Krehbiel, Ben [Krehbiel.Ben@epa.gov]
Subject: RE: R7 HCMB Tools and Post VERA/VSIP Guidance

Thanks for sharing

From: Krehbiel, Ben
Sent: Tuesday, August 01, 2017 12:18 PM
To: Hill, Troy <Hill.Troy@epa.gov>
Subject: R7 HCMB Tools and Post VERA/VSIP Guidance

Troy – consider this draft at this point...we have changes to make to the scanned document (which I believe we used back in 2014 V/V)...

No action needed from you – just sending/including you because I mentioned on the phone last week...

We haven't utilized TAlentHub to a great extent yet, and don't think it'll work for some of our anticipated vacancies, but something that could be a very flexible tool during this time of uncertainty...

Ben

From: Krehbiel, Ben
Sent: Sunday, July 30, 2017 11:14 PM
To: R7 Deputies <R7_Deputies@epa.gov>
Subject: HCMB Tools and Post VERA/VSIP Guidance

R7 Deputies –

I regret that we weren't successful in delivering this to you on the 24th. We've been engaging with the SSC/Cincy to find out our temporary needs for determining (restructuring/eliminating) our anticipated accepted offers to targeted positions. We understand that these departures require either restructuring or eliminating...and we are seeking a period of time to make those decisions with long term impacts.

This is still in draft form – we are awaiting some answers the SSC is raising to OHR. Ultimately this is designed for all managers, but wanted to get your feedback on this as you digest it.

Ben

POST VERA/VSIP GUIDANCE FOR REGION 7 MANAGERS

As noted in Edward Chu's July 14th all hands message, "we will find a way to fill the most critical gaps, repurpose our work, and in some cases, make conscious decisions to stop doing work that is not necessary for our core mission or work that our state and local government partners are equipped and legally able to manage. In all we do moving forward, please look for the most efficient and effective ways to get things done."

With that in mind, managers need to take a hard look at the work which has typically been done in their organization and determine what work remains mission critical for Region 7 given Agency priorities and fiscal restraints. Engaging staff in discussions about priority work and efficiencies is encouraged.

If a manager determines there is a critical resource need, the “Request Form for Exception to Hiring Freeze” must be completed. See 1st attachment.

Remember that the Agency remains under a hiring freeze, which presently limits actions to:

- Internal Reassignments
- Noncompetitive Temporary Details
- Temporary promotions

For more information related to the hiring freeze, refer to the February 22, 2017 memo from Donna Vizian, OARM, included at the end of this document.

NOTE: Unless a position was designated as “safe” (i.e. several Superfund positions), all positions vacated under Region 7’s 2017 VERA/VSIP Plan must be restructured before refilling the position. Below are the four options for restructuring:

- Change from supervisory to non-supervisory.
- Decrease the grade and/or full performance level (i.e., at least one grade level lower than the current position).
- Change the series of the position. Note: Changing an interdisciplinary position (e.g. from scientist to engineer) does not qualify.
- Significantly change the duties of the position (at least 25%) if the series and grade are to remain the same (i.e., the incumbent who vacated could not be expected to learn how to perform these new duties within a reasonable amount of time. Since the Cincinnati Human Resources Shared Service Center will determine if the change in duties are significant, early engagement with the SSC is strongly encouraged.

Refer to the 2nd attachment for guidance regarding:

Details

Reassignments

Temporary Promotions

Alternative Staff Options (Job Swap, Skills Marketplace)

Reorganizations (Note: Per the hiring freeze guidance, reorganizations are presently on hold as well)

Management Rights

Position Descriptions

Important Union Considerations

Frequently Asked Questions

In addition to this guidance, here is some further information regarding details and inservice placement:

Details:

The following link provides the SSC Standard Operating Procedure for details: http://intranet.epa.gov/ssc/hr_practitioners/ssc-sop-15300.pdf

Purpose/Definition:

- Details may be established positions (positions having a classified position description) or to unclassified positions (positions described in lists of duties only where there has not yet been a determination made on the Title, Occupational Series, or Grade).
- Details are used to address unexpected workload, special projects, the continuation of work of a position during an employee’s absence or as a developmental assignment.
- A detail is a temporary assignment to another position with no change in compensation.

- A detail is a temporary assignment of an employee to a different position for a specified period when the employee is expected to return to his or her regular duties at the end of the assignment. Details are processed in increments of 120 days or less as required by Title 5, United States Code 3341. During a detail, the employee continues to hold the position of record from which detailed (home office) for official personnel purposes such as pay rates and locality pay.

Conditions:

- All details, regardless of the length of time, require an SF-52, Request for Personnel Action to be processed.
- Details are processed in increments of 120 days or less.
- Details in excess of 120 days to unclassified duties and details to classified positions beyond 1 year must have appropriate justification. (see Procedures)
- Employees do not have to meet the qualification requirements (specialized experience, time-in-grade) for the position to which they are detailed, except any individual occupational requirements of the series for a classified detail position, such as minimum educational, license and certification requirements.

Procedures:

- The receiving office submits a detail package to the SSC in accordance with the SSC Checklist and the SSC Transaction Processing Schedule (15 calendar days prior to the effective date) and the conditions as outlined in this SOP.
- A complete detail package includes all of the following:
 - a) Completed SF-52, the SF-52 must include concurrence of the supervisor of record (home office).
 - b) The supervisor of record (home office) must also concur with extensions of details. (written concurrence needs to be included with package).
 - c) If detail is determined to exceed more than 120 days, additional completed SF-52s extension(s) in 120 day increments must be submitted with the initial detail action along with the termination of detail action.
 - d) If required, applicable management written justification, position description or description of duties; (See conditions).

Classification Review:

- Position descriptions are required for details to classified positions. Requests for extensions to classified positions beyond one year must include a written justification. Justifications must address workload needs requiring shifts of personnel and why the work is not being done by permanent reassignment.
- A description of duties is required for details to unclassified positions. A justification as to why a classified position description can't be provided must be included if the unclassified detail is extended beyond 120 days. Justifications must address workload needs requiring shifts of personnel and why they are not being done by a classified position or by permanent assignment.
- SF-52s for employees detailed to sensitive positions from non-sensitive positions, must be submitted by the SSC to PSB to determine if a higher risk designation level is required and must receive a favorable adjudication prior to the detail being effective. This requires the classifier to check the risk designation/sensitivity level of the permanent positions of records and the position the employee is being detailed into.

Inservice Placement:

If there is an individual who can successfully perform the work in a position vacated under V/V but may not meet all the specialized experience requirements, talk to the SSC regarding the possibility of an inservice placement. Note that the individual must still meet any educational requirements, so this option is most applicable to job series without positive educational requirements such as environmental protection specialists, human resource specialists, etc. Further guidance is provided below:

Modifying experience requirements for certain inservice placement actions -- An agency may determine that an individual can successfully perform the work of a position even though that person may not meet all the requirements in the OPM qualification standard. In that situation, agencies are authorized to modify OPM qualification standards for reassignments, voluntary changes to lower grades, transfers, reinstatements, and repromotions to a grade not higher than a grade previously held when the applicant's background includes related experience that provided the KSA's necessary for successful job performance. This authority should be used only when there is a reasonable likelihood that the employee will successfully make the transition to the new position, and cannot be used for directed reassignments to positions in which an employee obviously would not be able to perform the work.

This authority is **not** to be used for placement to a higher grade, except where the employee previously held a position at that grade or higher grade levels.

The agency's use of a modified standard should be documented sufficiently to show that it was intentional, and that the assignment did not result from misinterpretation of the OPM standard.

Inservice placement does not require the position to become incumbency only.

From: Vizian, Donna

Sent: Wednesday, February 22, 2017 4:44 PM

To: 2017HQfirstassistants <2017HQfirstassistants@epa.gov>; 2017Regionfirstassistants <2017Regionfirstassistants@epa.gov>

Cc: DAA-Career <DAACareer@epa.gov>; DRA <DRA@epa.gov>; ARA <ARA@epa.gov>; Roberts, Suzanne <Roberts.Suzanne@epa.gov>; Barnett, Howard <Barnett.Howard@epa.gov>

Subject: Final Hiring Guidance

Thank you for the comments and questions on the interim agency guidance related to the hiring freeze. We have considered these comments and tried to address the questions in the final guidance below.

As you know, on January 23, 2017 the President directed a freeze on the hiring of federal civilian employees via Presidential Memorandum entitled "Hiring Freeze". OMB and OPM issued guidance on January 25, 2017 (M-17-17) and January 31, 2017 (M-17-18) to clarify and provide information on the types of exemptions authorized under the hiring freeze. On February 11, 2017 they provided answers to frequently asked questions.

As a general rule, no vacant position existing at noon on January 22, 2017 may be filled and no new positions may be created, except in limited circumstances. This applies to all positions regardless of how the position is funded, i.e., Pesticide Fees. Agencies are also prohibited from making any competitive promotions (Internal Merit Promotion) during the hiring freeze.

I would like to highlight one change. We removed the requirement to check in with the CHCO if a detail or reassignment would cross a NPM/Region. Please keep in mind that the goal during this brief period is to do our best to cover our work within our organizations. Also, please remember that Skills Marketplace projects are not impacted by the freeze. This is a great way to offer developmental opportunities to our staff during this period.

The below EPA guidance is based on all information received from OMB/OPM and discussions held with agency senior leadership.

1. General Exemptions to the Hiring Freeze

- Hiring Commissioned Corps of the US Public Health Service
- Student volunteers who are pursuing their educational goals
- Appointments made under the Pathways INTERNSHIP program. Agencies must ensure that hires under this program understand that conversion is not guaranteed. This does NOT include the Pathways Recent Graduates program.
- Appointment of Presidential Management Fellows. Agencies must ensure that hires understand that conversion is not guaranteed. I also ask that you carefully consider utilizing PMFs considering the cost and the potential of not being able to convert them to permanent status.
- Conversion in the ordinary course to the competitive service of CURRENT agency employees serving in positions with conversion authority, such as Veteran's Recruitment Act (VRA) and Pathways programs.
- Internal career ladder promotions
- Term and temporary appointments of existing federal employees may be extended up to the maximum allowable time limit

2. Exemptions Allowed by Agency Head

- Job offers made prior to January 22, 2017 but for which the individual has a confirmed start date that is later than February 22, 2017 or does not have a confirmed start date. On a case-by-case basis the Agency head can approve based on essential mission priorities, current agency resources, and funding levels.
- Positions deemed necessary to meet national security responsibilities or meet public safety responsibilities. Can be exempted after consultation with agency Chief Human Capital Officer and General Counsel. The Agency must also notify OPM and EPA's OMB Resource Management Office (Mike Hickey).

3. Exceptions to the Hiring Freeze to the extent that an agency head deems the action necessary to meet the highest priority needs of the agency or to ensure that essential services are not interrupted

- Internal Reassignments
- Noncompetitive Temporary Details
- Temporary promotions

All detail, non-competitive temporary promotions, and reassignment actions require a determination that the position is critical to fill in that it meets the highest priority needs of the agency or to ensure essential services are not interrupted.

The ability to make this determination regarding non-competitive details, temporary promotions and reassignments has been delegated to the Assistant Administrators and Regional Administrators (attached). This decision must be documented and maintained in a file held by the senior resource official.

In general:

- Actions submitted to your Shared Service Center prior to January 22, 2017 are being processed.
- Actions submitted after January 22 but before February 14 require the determination by the AA/RA that the position is critical and meets the highest priority needs of the agency or to ensure essential services are not interrupted. If approved, the AA/RA or SRO must notify the SSC before they will process.
- The SSC will assume all actions received on or after February 14 were reviewed and approved consistent with the Acting Administrator's delegation.

Reassignments

- Actions within your NPM/Region – These actions may proceed once the determination of need (critical/essential) is made by the AA/RA.
- Actions across NPMs/Regions - After making a selection, but prior to discussing with the selected candidate, the SRO in the gaining organization must obtain concurrence from the SRO in the home organization.

Noncompetitive Temporary Details and Temporary Promotions (excludes PMF required developmental details)

- Actions within your NPM/Region – These actions may proceed once the determination of need (critical/essential) is made by the AA/RA.
 - Actions across NPMs/Regions – After making a selection, but prior to discussing with the selected candidate, the SRO in the gaining organization must obtain concurrence from the SRO in the home organization.
4. **EPA Reorganizations** – Because agencies are prohibited from creating any new positions during this hiring freeze, all pending reorganizations will be processed up to the point of implementation and then will be stopped until the hiring freeze is lifted. Organizational title changes, where the only change is to the name of an organization and does not involve any movement of staff are exempted from this freeze any may continue.
 5. **Pending Recruitment Workload with Shared Service Center** – SSCs will provide a list of all pending recruitment actions (those that were already advertised on USAJOBS) and the status of those requests to the SRO. AA/RA are asked to review that list with the SRO and make a determination on those positions that are critical to your mission and would be the highest priority vacancies you would expect to fill once a freeze is lifted. The SSC will then complete and issue certificates of eligible. Programs and Regions could then proceed up to the point of selection. If the freeze is still in place, no tentative offer will be made until the freeze is lifted. Please be clear with applicants that a final hiring decision is subject to lifting of the hiring freeze by OMB/OPM.
 6. **Posting of Vacancies on USAJOBS during Hiring Freeze** – Generally, during the hiring freeze the Shared Service Centers will not be posting any EPA vacancies on USAJOBS with the following limited exceptions:

Exemption Granted by the Director of OPM – As outlined in M-17-18, the Director of OPM may grant additional exemptions from the hiring freeze for critical situations. EPA's Administrator has to make a request in writing to the Director of OPM explaining the critical need and how it relates to essential services or critical mission requirements; explain why reassignment/detail of existing staff is not possible, and explain the urgency of need and consequences of not filling the position within a 3-6-month timeline.

Critical Vacancy Identified by AA/RA – For critical vacancies where a program/region knows a position will be filled once the hiring freeze is lifted, the AA/RA can submit a justification to the CHCO requesting approval to post a vacancy. In those situations, recruitment activity can proceed up to the point of selection. If the freeze is still in place, no tentative offer will be made until the freeze is lifted. Please be clear with applicants that a final hiring decision is subject to lifting of the hiring freeze by OMB/OPM.

Pathway Internships – These actions may proceed.

I appreciate your continued support and cooperation in following the above guidance during this hiring freeze. I will continue to share additional information provided by OPM/OMB. Please let John or myself know if you have any questions.

Message

From: Hill, Troy [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=42EC80F65FB64BF8958D43F22F69B337-HILL, TROY]
Sent: 6/30/2017 5:46:05 PM
To: Clifton, Tony [Clifton.Tony@epa.gov]
Subject: v/v
Attachments: R6 VV Justification (w-Budget Tables) 6-30-17.docx

Troy Hill
Management Division
EPA Region 6
214-665-6647
Hill.Troy@epa.gov



Message

From: Hill, Troy [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=42EC80F65FB64BF8958D43F22F69B337-HILL, TROY]
Sent: 5/22/2018 12:50:50 PM
To: Clifton, Tony [Clifton.Tony@epa.gov]; Young, Kendrick [Young.Kendrick@epa.gov]
Subject: 30 max V/V documents
Attachments: R6 VV Justification max 30 (w-Budget Tables) 5-22-18.docx; VV Numbers 30 Max condensed 5-22-18.xlsx

Troy Hill
Management Division
EPA Region 6
214-665-6647
Hill.Troy@epa.gov




Message

From: Hill, Troy [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=42EC80F65FB64BF8958D43F22F69B337-HILL, TROY]
Sent: 6/1/2017 8:15:39 PM
To: Gray, David [gray.david@epa.gov]; McDonald, James [McDonald.James@epa.gov]
Subject: RE: Request for Additional V/V Information
Attachments: R6 VV Justification (w-Budget Tables) 6-1-17.docx

New numbers based on hiring  GS-9 step 1 positions in FY 18

From: Gray, David
Sent: Thursday, June 01, 2017 2:47 PM
To: Hill, Troy <Hill.Troy@epa.gov>; McDonald, James <McDonald.James@epa.gov>
Subject: RE: Request for Additional V/V Information

Recalculate using all positions filled at GS-9 with  positions eliminated.

From: Hill, Troy
Sent: Thursday, June 01, 2017 12:45 PM
To: Gray, David <gray.david@epa.gov>; McDonald, James <McDonald.James@epa.gov>
Subject: RE: Request for Additional V/V Information

Yes headed up

From: Gray, David
Sent: Thursday, June 01, 2017 12:44 PM
To: Hill, Troy <Hill.Troy@epa.gov>; McDonald, James <McDonald.James@epa.gov>
Subject: RE: Request for Additional V/V Information

I have a 1 pm. Can we talk before then?

From: Hill, Troy
Sent: Thursday, June 01, 2017 12:44 PM
To: Gray, David <gray.david@epa.gov>; McDonald, James <McDonald.James@epa.gov>
Subject: RE: Request for Additional V/V Information

I am available to go over them when you have time

From: Gray, David
Sent: Thursday, June 01, 2017 12:42 PM
To: McDonald, James <McDonald.James@epa.gov>; Hill, Troy <Hill.Troy@epa.gov>
Subject: RE: Request for Additional V/V Information

I tried to call Troy. I don't fully understand the numbers.

From: McDonald, James
Sent: Thursday, June 01, 2017 12:35 PM
To: Hill, Troy <Hill.Troy@epa.gov>

Cc: Gray, David <gray.david@epa.gov>

Subject: Re: Request for Additional V/V Information

Hi David,

Do we have the okay to proceed with sending this information on to HQ?

Regards,

Sent from my iPhone

On Jun 1, 2017, at 10:32 AM, Hill, Troy <Hill.Troy@epa.gov> wrote:

Attached is the Region 6 V/V info including budget information – assumptions used

Payroll amount does not include awards, overtime or comp time

Payroll is based on FY 17 authorized FTE

FY18 inflation/COLA 1.9%, FY19 inflation/COLA 1%

Target is our 147 maximum offers

Region will hire 30 GS-9 step 1 in FY 18 and 19

From: Gray, David

Sent: Thursday, June 01, 2017 6:52 AM

To: Hill, Troy <Hill.Troy@epa.gov>; McDonald, James <McDonald.James@epa.gov>

Subject: FW: Request for Additional V/V Information

Not sure what they are looking for – let me know.

From: Schulman, Marvin

Sent: Wednesday, May 31, 2017 6:31 PM

To: Gray, David <gray.david@epa.gov>; McDonald, James <McDonald.James@epa.gov>; Hill, Troy <Hill.Troy@epa.gov>

Cc: Hunt, Loretta <Hunt.Loretta@epa.gov>; Hart, Debbi <Hart.Debbi@epa.gov>

Subject: Request for Additional V/V Information

Thank you for your V/V submission.

In reviewing your business case we realized that that document did not include your budgetary information

The attached document is a copy of your business case with the two budget tables attached.

We look forward to seeing your revised submission.

If I can be of additional assistance, please let me know.

Thank you

Marvin Schulman
Office of Human Resources
(202) 564-7778

Message

From: Hill, Troy [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=42EC80F65FB64BF8958D43F22F69B337-HILL, TROY]
Sent: 5/21/2018 7:12:59 PM
To: Clifton, Tony [Clifton.Tony@epa.gov]
Subject: 30 Max V/V
Attachments: R6 VV Justification max 30 (w-Budget Tables) 5-21-18.docx; VV Numbers 30 Max 5-21-18.xlsx

Troy Hill
Management Division
EPA Region 6
214-665-6647
Hill.Troy@epa.gov



Message

From: Hill, Troy [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=42EC80F65FB64BF8958D43F22F69B337-HILL, TROY]
Sent: 5/8/2017 12:37:06 PM
To: McDonald, James [McDonald.James@epa.gov]
Subject: Draft Regional Document
Attachments: R6 VV Justification1.docx

James,

This is the draft Regional document – as the Regional options evolve more detail can be added. There is still discussion on how to identify “safe” positions but hopefully more information will come out this week.

Troy Hill
Management Division
EPA Region 6
214-665-6647
Hill.Troy@epa.gov



Message

From: Hill, Troy [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=42EC80F65FB64BF8958D43F22F69B337-HILL, TROY]
Sent: 5/15/2018 6:58:03 PM
To: McDonald, James [McDonald.James@epa.gov]
CC: Clifton, Tony [Clifton.Tony@epa.gov]; Young, Kendrick [Young.Kendrick@epa.gov]; Bonnell, Corey [bonnell.corey@epa.gov]
Subject: V/V draft 5/15
Attachments: VV Numbers 5-14-18.pdf; R6 VV Justification 1a (w-Budget Tables) 5-15-18.docx

This version does not include any attorney and financial positions. The financial information has been updated based on input from Corey.

Message

From: Hill, Troy [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=42EC80F65FB64BF8958D43F22F69B337-HILL, TROY]
Sent: 5/29/2018 12:48:30 PM
To: Clifton, Tony [Clifton.Tony@epa.gov]; Young, Kendrick [Young.Kendrick@epa.gov]
Subject: Latest write up for V/V
Attachments: R6 VV Justification 1b (w-Budget Tables) 5-25-18.docx

Troy Hill
Management Division
EPA Region 6
214-665-6647
Hill.Troy@epa.gov



Message

From: Storm, Derrick [storm.derrick@epa.gov]
Sent: 10/4/2017 12:45:22 PM
To: Price, Patricia [price.patricia@epa.gov]; Smocks, Carla [Smocks.Carla@epa.gov]
Subject: RE: Management Directed Reassignment and Mission Critical Positions
Attachments: EPA Prog and Reg Business Cases Final 7-7-17.docx

Sensitivity: Company Confidential

You're welcome Pat,

I found more language supporting Management's flexibilities and justifications in the attached EPA Business Case regarding the recent VERA/VSIP.

I'm still looking for arbitrations regarding the matter.

Thanks,

Derrick



Derrick M. Storm J.D.
HR Specialist (ER/LR)
EPA Region 7 – Human Capital Management Branch
11-F51 – Office
(913) 551-7600 – Office Phone

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From: Price, Patricia
Sent: Wednesday, October 04, 2017 7:40 AM
To: Storm, Derrick <storm.derrick@epa.gov>; Smocks, Carla <Smocks.Carla@epa.gov>
Subject: RE: Management Directed Reassignment and Mission Critical Positions
Sensitivity: Confidential

Good Morning Derrick,

Thank you for researching and gathering this supportive information. Most helpful!

Pat Price
Human Resources Officer
EPA – Region 7
Office of Policy & Management
Human Capital Management Branch
11201 Renner Blvd
Lenexa, KS 66219
913 551-7575
Price.patricia@epa.gov
Strengthfinder Themes: Responsibility, Arranger, Developer, Harmony and Focus

From: Storm, Derrick
Sent: Wednesday, October 04, 2017 7:02 AM
To: Price, Patricia <price.patricia@epa.gov>; Smocks, Carla <Smocks.Carla@epa.gov>
Subject: Management Directed Reassignment and Mission Critical Positions
Sensitivity: Confidential

Good morning Pat, Carla,

I've reviewed some information about the following scenario and I'm currently looking for Arbitrations regarding similar circumstances. I will let you know what I've found shortly. Thus far, I find the primary interests concerns are retaining management's rights to reassign employees in order to accomplish the agency's mission and critical functions. Some justification can (conversely) be found in RIF regulations (attached).

Reassignment of Mission Critical Positions

Interim measures (temporary reassignment pending restructuring of positons)
Senior OSC reassignment results in a negative impact on the continuing mission critical operations.

ISSUE:

Interim measures (temporary reassignment pending restructuring of positons)

EXAMPLE:

Senior OSC reassignment results in a negative impact on the continuing mission critical operations

SEARCH TERMS/CONSIDERATIONS:

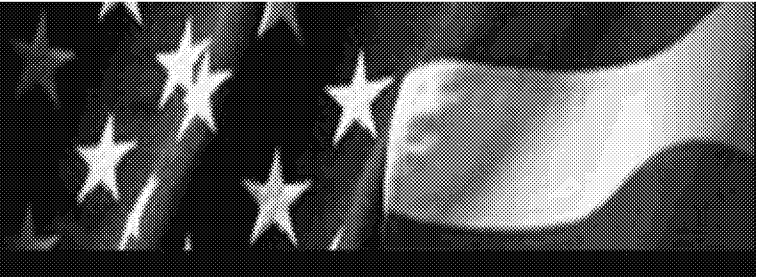
1. Management justification for restricting Reassignment of Mission Critical Positions

2. Management justification for restricting the temporary Reassignment of Employees
in Mission Critical Positions

Thanks,
Derrick

*"The ultimate judge of a person's character is
their ability to exceed expectations when little
recognition or praise is given."*

***A Quote appearing on the Poster, "Unsung
Heroes" – In Honor of the Tuskegee Airmen***



Derrick M. Storm J.D.

HR Specialist (ER/LR)

EPA Region 7 – Human Capital Management Branch

1.1-F51 – Office

(913) 551-7600 – Office Phone

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Message

From: Brincks, Mike [brincks.mike@epa.gov]
Sent: 9/27/2017 8:21:12 PM
To: R7 Senior Staff [R7_Senior_Staff@epa.gov]; R7 Deputies [R7_Deputies@epa.gov]
CC: Price, Patricia [price.patricia@epa.gov]; Kohler, Carla [Kohler.Carla@epa.gov]
Subject: RE: R7 freeze on internal personnel actions

Hi all,

I've had a few questions about the meaning of the phrase "**that have not been filled**" high-lighted in red print below. The intent is that the freeze applies to those situations where a person had not yet been selected and notified of the detail or reassignment as of yesterday when my email was sent. If the person had already been selected and notified as of yesterday 5 p.m. but the detail is not yet effective, you're still good to go. Note the freeze does not apply to intra-divisional or office actions, so long as you have the approved RA determination.

Thanks, and let me know if there are additional questions.



Mike Brincks

Assistant Regional Administrator
Office of Policy & Management
US Environmental Protection Agency, Region 7
11201 Renner Boulevard
Lenexa, KS 66219
Office: 913-551-7799
brincks.mike@epa.gov

From: Brincks, Mike
Sent: Tuesday, September 26, 2017 4:59 PM
To: R7 Senior Staff <R7_Senior_Staff@epa.gov>; R7 Deputies <R7_Deputies@epa.gov>
Cc: Price, Patricia <price.patricia@epa.gov>; Kohler, Carla <Kohler.Carla@epa.gov>
Subject: R7 freeze on internal personnel actions

Senior Staff & Deputies,

As you know, under Final Hiring Guidance issued by HQ (OARM) back in February, NPMs and Regions have been allowed to move forward on the following types of internal personnel actions:

- **Internal Reassignments**
- **Noncompetitive Temporary Details (same grade)**
- **Temporary Promotion Details (not to exceed 120 days)**

That guidance further stipulated that to proceed with these types of actions first requires a determination by the RA that the position is critical to fill in that it meets the highest priority needs of the agency or to ensure essential services are not interrupted. In R7, we developed a standard form to request such determinations from the RA.

[https://](https://www.epa.gov/region7/r7-freeze-on-internal-personnel-actions)

Ex. 6 - Personal Privacy

Ex. 6 - Personal Privacy

Subsequent to the issuance of the February 2017 guidance, the agency conducted a VERA/VSIP (early-out/buy-out) process. Twenty nine (29) R7 personnel separated as a result of VERA/VSIP(VV).

In an effort to chart a collective post-VV path forward, today Ed, Karen and I met to discuss the need to develop a process to identify current (and future) critical vacancies resulting from VV and normal attrition - and how to best fill those positions internally on either a temporary or permanent basis until such time as the agency hiring freeze is lifted. We expect to share a draft with you and finalize this new process within the next two weeks.

In the interim and effective immediately, the region is putting our own freeze on any internal Reassignments, Noncompetitive Details and Temporary Promotion Details that have not yet been filled. The only exception to this freeze will be for Noncompetitive Details and Temporary Promotion Details that can be filled internal to your respective division or office (ex., PLMG could only temporarily detail a person within PLMG) . For these types of within division/office exceptions, please use the same standard form mentioned above.

Thanks in advance for your understanding and patience.



Mike Brincks

Assistant Regional Administrator

Office of Policy & Management

US Environmental Protection Agency, Region 7

11201 Renner Boulevard

Lenexa, KS 66219

Office: 913-551-7799

brincks.mike@epa.gov

Message

From: Bonner, Jerome [Bonner.Jerome@epa.gov]
Sent: 9/27/2017 6:27:12 PM
To: Brincks, Mike [brincks.mike@epa.gov]
CC: Price, Patricia [price.patricia@epa.gov]; Dunbar, Danielle [dunbar.danielle@epa.gov]; Krehbiel, Ben [Krehbiel.Ben@epa.gov]; Smocks, Carla [Smocks.Carla@epa.gov]; Bonner, Jerome [Bonner.Jerome@epa.gov]
Subject: RE: R7 freeze on internal personnel actions
Attachments: Region 7 Actions with the SSC.XLSX; Region 7 Actions with the Customer.xlsx

Hi Mike

Please find attached 2 reports. The first report illustrates all R7 personnel actions residing in the HRSSC. We do not have the IT Branch Chief action referenced below.

The second report illustrates personnel action residing with R7. Please note several of these actions are fairly old and I recommend your HR Office review the actions to determine whether they should be deleted.

I believe Pat is aware, but both of these reports may be generated locally using the recently created HRSSC Dashboards.

Thanks
JB

Jerome W. Bonner
Environmental Protection Agency
Office of Administration and Resources Management - Cincinnati
Director, Human Resources
Cincinnati Human Resources Shared Service Center
Tel: 513.569.7950
Mobile: Ex. 6 - Personal Privacy

CONFIDENTIALITY: This communication may contain privileged or other confidential information. If you are not the intended addressee, or believe you have received this communication in error, you may neither copy, disseminate, nor distribute it to anyone else or use it in any unauthorized manner; to do so is strictly prohibited and may be unlawful. If you receive this email by mistake, please advise the sender immediately by using the reply facility in your mail software and delete it from your computer. "Information in this message may be subject to the Privacy Act (5 USC 552a) and should be treated accordingly."

From: Smocks, Carla
Sent: Wednesday, September 27, 2017 1:50 PM
To: Brincks, Mike <brincks.mike@epa.gov>; Bonner, Jerome <Bonner.Jerome@epa.gov>
Cc: Price, Patricia <price.patricia@epa.gov>; Dunbar, Danielle <dunbar.danielle@epa.gov>; Krehbiel, Ben <Krehbiel.Ben@epa.gov>
Subject: RE: R7 freeze on internal personnel actions

Thanks Mike and Jerome.

Carla

From: Brincks, Mike

Sent: Wednesday, September 27, 2017 12:39 PM

To: Bonner, Jerome <Bonner.Jerome@epa.gov>; Smocks, Carla <Smocks.Carla@epa.gov>

Cc: Price, Patricia <price.patricia@epa.gov>; Dunbar, Danielle <dunbar.danielle@epa.gov>; Krehbiel, Ben <Krehbiel.Ben@epa.gov>

Subject: RE: R7 freeze on internal personnel actions

That would be good Jerome.

Just to clarify, this freeze only applies to the internal actions listed. We received a hiring freeze waiver from the Deputy Administrator (and Donna V) to hire an IT Branch Chief and we plan to post that both internal/external to EPA, so that one would not be not subject to this freeze. Not sure if that is the report. It would be good for us to review and let you know which are ok/not ok.

Thanks Jerome.



Mike Brincks

Assistant Regional Administrator

Office of Policy & Management

US Environmental Protection Agency, Region 7

11201 Renner Boulevard

Lenexa, KS 66219

Office: 913-551-7799

brincks.mike@epa.gov

From: Bonner, Jerome

Sent: Wednesday, September 27, 2017 12:29 PM

To: Smocks, Carla <Smocks.Carla@epa.gov>

Cc: Price, Patricia <price.patricia@epa.gov>; Dunbar, Danielle <dunbar.danielle@epa.gov>; Brincks, Mike <brincks.mike@epa.gov>; Krehbiel, Ben <Krehbiel.Ben@epa.gov>

Subject: RE: R7 freeze on internal personnel actions

Hi Carla

Would it help if I sent you a report containing all recruit and non-recruit actions we have for R7? If so desired, I could probably get you the report today or early in the morning.

Thanks

JB

Jerome W. Bonner

Environmental Protection Agency

Office of Administration and Resources Management - Cincinnati

Director, Human Resources

Cincinnati Human Resources Shared Service Center

Tel: 513-569-7950

Mobile: Ex. 6 - Personal Privacy

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From: Smocks, Carla
Sent: Wednesday, September 27, 2017 1:26 PM
To: Bonner, Jerome <Bonner.Jerome@epa.gov>
Cc: Price, Patricia <price.patricia@epa.gov>; Dunbar, Danielle <dunbar.danielle@epa.gov>; Smocks, Carla <Smocks.Carla@epa.gov>; Brincks, Mike <brincks.mike@epa.gov>; Krehbiel, Ben <Krehbiel.Ben@epa.gov>
Subject: FW: R7 freeze on internal personnel actions

Hello Jerome,

Please see the attached guidance that R7 is sending to our Senior Staff and Deputies. We are requesting your team's assistance in ensuring that R7 adheres to the freeze in place. Please do not process any actions received from R7 relating to the guidance without first checking with Pat Price, HRO; Ben Krehbiel, DARA; or Mike Brincks, ARA. Due to the process for actions, R7 HR and Senior Staff are not always aware of actions. We appreciate your support as we move forward post VERA/VSIP.

Carla Smocks, Acting HRO for Pat Price

From: Brincks, Mike
Sent: Tuesday, September 26, 2017 4:59 PM
To: R7 Senior Staff <R7_Senior_Staff@epa.gov>; R7 Deputies <R7_Deputies@epa.gov>
Cc: Price, Patricia <price.patricia@epa.gov>; Kohler, Carla <Kohler.Carla@epa.gov>
Subject: R7 freeze on internal personnel actions

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<https://>

Ex. 6 - Personal Privacy

Ex. 6 - Personal Privacy

ED_001372E_00130790-00003

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Thanks in advance for your understanding and patience.



Mike Brincks

Assistant Regional Administrator
Office of Policy & Management
US Environmental Protection Agency, Region 7
11201 Renner Boulevard
Lenexa, KS 66219
Office: 913-551-7799
brincks.mike@epa.gov

Message

From: StGermain, Margie [StGermain.Margie@epa.gov]
Sent: 9/11/2017 4:30:56 PM
To: Breedlove, Dan [Breedlove.Dan@epa.gov]; Bhesania, Amy [Bhesania.Amy@epa.gov]; Curtis, Glenn [curtis.glenn@epa.gov]; Davis, Michael [Davis.Michael@epa.gov]; Gibbs, Eric [gibbs.eric@epa.gov]; Goetz, Mary [goetz.mary@epa.gov]; Hoefer, David [Hoefer.David@epa.gov]; Kovac, Steve [Kovac.Steve@epa.gov]; Lubbe, Wendy [Lubbe.Wendy@epa.gov]; Price, Patricia [price.patricia@epa.gov]; Walker, Stanley [Walker.Stanley@epa.gov]
Subject: FW: Post VERA/VSIP update and next Steps
Attachments: Workforce Readiness and Restructuring.docx; R7 Separating Employee Current POC.docx

This was shared.

Margie St. Germain
Laboratory Director
STC/ENST/LTAB
913-551-5154

From: Tapia, Cecilia
Sent: Thursday, September 07, 2017 4:45 PM
To: Adkins, Tabatha <Adkins.Tabatha@epa.gov>; Beringer, Mike <Beringer.Michael@epa.gov>; Davis, Michael <Davis.Michael@epa.gov>; Field, Jeff <Field.Jeff@epa.gov>; StGermain, Margie <StGermain.Margie@epa.gov>; Tapp, Joshua <Tapp.Joshua@epa.gov>
Subject: FW: Post VERA/VSIP update and next Steps

Cecilia Tapia
Director, Environmental Sciences & Technology Division
U.S Environmental Protection Agency, Region 7
11201 Renner Blvd. Lenexa, KS 66219
Phone: (913)551-7733 Cell: Ex. 6 - Personal Privacy Email: tapia.cecilia@epa.gov

From: Brincks, Mike
Sent: Thursday, September 07, 2017 12:37 PM
To: R7 Senior Staff <R7_Senior_Staff@epa.gov>; R7 Deputies <R7_Deputies@epa.gov>
Cc: Price, Patricia <price.patricia@epa.gov>; Flournoy, Luetta <Flournoy.Luetta@epa.gov>
Subject: Post VERA/VSIP update and next Steps

Good afternoon,

Many of us are still adjusting to the recent departure of a number of our esteemed colleagues under VERA/VSIP and wondering what's next.

As noted in Ed Chu's July 14th all hands message, "we will find a way to fill the most critical gaps, repurpose our work, and in some cases, make conscious decisions to stop doing work that is not necessary for our core mission or work that our state and local government partners are equipped and legally able to manage. In all we do moving forward, please look for the most efficient and effective ways to get things done." Region 7 and the Agency as a whole, are taking a hard look at the priority, mission critical work that will continue to be done and how it will be done (think Lean).

The Agency remains under a hiring freeze, which presently limits actions to: 1) Internal Reassignments, 2) Noncompetitive Temporary Details, and 3) Temporary Promotions. For critical resource needs, upon approval from the DRA/RA an exception to the hiring freeze may be requested from EPA Headquarters.

Except for several Superfund positions, other **positions vacated under Region 7's 2017 VERA/VSIP Plan** must also be restructured before refilling the position even temporarily (i.e., details) based on current guidance. Below are the four options for restructuring:

- Change from supervisory to non-supervisory.
- Decrease the grade and/or full performance level (i.e., at least one grade level lower than the current position).
- Change the series of the position. Note: Changing an interdisciplinary position (e.g. from scientist to engineer) does not qualify.
- Significantly change the duties of the position (at least 25%) if the series and grade are to remain the same.

Since it will take time to determine critical resource needs, request an exception to the hiring freeze, and restructure any of these positions vacated as a result of VERA/VSIP, the following information is provided regarding interim points of contact for those positions left vacant due to VERA/VSIP:

For staff positions vacated under VERA/VSIP, contact their supervisor regarding questions about their areas of responsibility. See attached list of departed staff/supervisor.

For management/supervisory positions vacated:

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RCRA Corrective Action and Permits Section (vice Jeff Johnson): Contact Don Lininger.

ENST:

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Contact Cecilia Tapia/Josh Tapp/Margie St.Germain.

WWPD:

Watershed Planning and Implementation Branch (vice Steve Kovac): Contact Glenn Curtis.
Water Quality Management Branch (vice John DeLashmit): Contact Jeff Robichaud.
Also, continue to contact Diane Huffman regarding "WWPD Deputy" questions.

Watch for further updates as we learn more about next steps here in Region 7! **If you have questions, please contact Pat Price, R7 Human Resources Officer. x 7575**

Also, see the attachment for guidance regarding:

Details
Reassignments
Temporary Promotions
In-Service Placement
Alternative Staffing Options (Job Swap, Skills Marketplace)
Reorganizations (Note: Per the hiring freeze guidance, reorganizations are presently on hold as well)
Management Rights
Position Descriptions
Frequently Asked Questions

From: Brincks, Mike [brincks.mike@epa.gov]
Sent: 9/7/2017 5:37:29 PM
To: R7 Senior Staff [R7_Senior_Staff@epa.gov]; R7 Deputies [R7_Deputies@epa.gov]
CC: Price, Patricia [price.patricia@epa.gov]; Flournoy, Luetta [Flournoy.Luetta@epa.gov]
Subject: Post VERA/VSIP update and next Steps
Attachments: Workforce Readiness and Restructuring.docx; R7 Separating Employee Current POC.docx

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- Management Rights

- Position Descriptions

- Frequently Asked Questions

From: Brincks, Mike [brincks.mike@epa.gov]
Sent: 9/7/2017 5:31:08 PM
To: R7 Senior Staff [R7_Senior_Staff@epa.gov]; R7 Deputies [R7_Deputies@epa.gov]
CC: Price, Patricia [price.patricia@epa.gov]; Flournoy, Luetta [Flournoy.Luetta@epa.gov]
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Reorganizations (Note: Per the hiring freeze guidance, reorganizations are presently on hold as well)

Management Rights

Position Descriptions

Frequently Asked Questions

Message

From: Krehbiel, Ben [Krehbiel.Ben@epa.gov]
Sent: 9/7/2017 4:11:00 PM
To: Brincks, Mike [brincks.mike@epa.gov]; Flournoy, Luetta [Flournoy.Luetta@epa.gov]
CC: Price, Patricia [price.patricia@epa.gov]
Subject: Next Steps after V/V
Attachments: Workforce Readiness and Restructuring.docx; R7 Separating Employee Current POC.docx

Here's a clean final draft – including comments from deputies. I'm forwarding John Smith's comments for your consideration...

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From: Krehbiel, Ben [Krehbiel.Ben@epa.gov]
Sent: 8/1/2017 5:42:59 PM
To: Smocks, Carla [Smocks.Carla@epa.gov]; Algae-Eakin, Amy [Algae-Eakin.Amy@epa.gov]; Butkovich, Michael [Butkovich.Michael@epa.gov]; Denno, Donald [Denno.Donald@epa.gov]; Gibbs, Eric [gibbs.eric@epa.gov]; Kohler, Carla [Kohler.Carla@epa.gov]; Lubbe, Wendy [Lubbe.Wendy@epa.gov]; Price, Patricia [price.patricia@epa.gov]; Titus, Debbie [Titus.Debbie@epa.gov]
CC: Brincks, Mike [brincks.mike@epa.gov]; Flournoy, Luetta [Flournoy.Luetta@epa.gov]; Sindt, Rachelle [Sindt.Rachelle@epa.gov]
Subject: ActionRequested:PLMG Checkout/Separation Checklist 'coverage'
Attachments: R7 Employee Separation Checklist - Jul 2017.pdf

PLMG Managers - In 2014, Region 7 processed 49 separations---many using the 'Office Hours' process below. While we will not know our final number of V/V separations for the next few weeks, I would like to prepare to set up something similar to our 2014 separations processing effort.

I'm asking you NOW to ensure coverage in the following PLMG areas during the last two weeks of this month (August 21-September 1). I believe in 2014 we had 'all hands on deck' to process multiple folks at the same time (not just one individual for each branch/responsibility). If your area is not listed below, please look through the attached checklist to verify a service you provide isn't overlooked. I'll also reach out to CNSL for LitHold and Ethics checklist responsibilities.

Part 4	PLMG/SSFM	<i>Medical Surveillance</i> - Roy Krueger	x7296	1.1-F55
		<i>Occupant Emergency & GETS Card</i> - Jeff Daise	x7192	1.1-L55
		<i>Records</i> – Carmen Hullaby (primary)	x7070	1.1-J55
		Jolleen Kieslich (backup)	x7108	1.1-J53
Part 5	PLMG/R7IT	<i>IT Equipment & Mainframe Account</i> - Tri Knoke	x7484	2.1-D21
		<i>NSI</i> - Raymond Booke (also IT equipment backup)	x7120	2.1-B14
Part 6	PLMG/RFMB	Michele Miller (primary)	x7086	2.1-K57
		Bette Darks (backup)	x7687	2.1-N54
Part 7	PLMG/SSFM	Jeff Daise (primary)	x7741	2.1-K06
		John Begley (backup)	x7597	1.1-N55
Part 8	PLMG/HCMB	Euleashia Embry (primary)	x7550	2.1-L37

I welcome any feedback (and/or confirmations of my failing memory), but I suspect we could hold 2-3 90 minute sessions (instead of 4 two hour sessions)—with the understanding that we won't close shop on anyone (everyone completing their tasks gets the autographs needed).

Any thoughts?

Ben Krehbiel
Deputy ARA
EPA Region 7
913.551.7106

Separation Checkout Process & Office Hours for VERA/VSIP Departing Employees

When separating from the Agency, employees are required to complete a *Separation Checkout List* to account for all Government property in their possession or custody, outstanding cash or leave advances, financial indebtedness to the Agency, and unexpired terms and conditions of outstanding employment and/or training agreements. Failure to complete this clearance process may result in the delay of final salary payments.

To assist VERA/VSIP departing employees and others separating from the Agency, Region 7 has updated the required R7 Separation Checkout List and developed supplemental guidance to assist employees during this process.

The updated *R7 Separation Checkout List* and corresponding *Instructions* can be found soon on the R7@Work, Human Resources website. We are also including the checklist here for your convenience.



Employee Separation Checkout Instructions



32014.docx

Employee Separation Checkout List (3) 32014.docx

As soon as employees notify HROD that they are retiring or resigning/separating, they can begin completing the Separation Checkout List and obtaining clearance on the items in the form. It is recommended that Part 1 of the Checkout List be initiated as early as possible and no later than one week BEFORE the employee's last day in the office.

To further assist departing employees in obtaining all required signatures on the *R7 Separation Checkout List*, the following Separation Checkout Office Hours will also be available. During these Office Hours, representatives for each signature part of the *Separation Checkout List* will be available in one location so departing employees can obtain all necessary approvals at the same time. Please note that departing employees are not required to attend the Office Hours to checkout, they may also individually checkout with each signatory on the checklist at their convenience.

SEPARATION CHECKOUT OFFICE HOUR SCHEDULE

Date	Time	Room
Wednesday, March 26	1:00-3:00	1.A-K33
Monday, March 31	10:00-12:00	1.A-K33
Wednesday, April 2	11:00-12:00 and 2:00-3:00	1.A-K33
Thursday, April 3	10:00-12:00	1.A-K33

Questions? Please contact Angelia Taffe at x7367

Message

From: Weber, Rebecca [Weber.Rebecca@epa.gov]
Sent: 6/15/2017 10:21:24 PM
To: Price, Patricia [price.patricia@epa.gov]

Barb is free last 3 weeks of august. Should be able to arrange by then i think. Sept and oct booked. Also week of july 10. This is exciting.

Sent from my iPhone

On Jun 13, 2017, at 3:09 PM, Price, Patricia <price.patricia@epa.gov> wrote:

Good Afternoon,

The following addresses the clarification regarding VERA/VSIP Hiring Freeze on movement into and out of target V/V positions as stated below:

The ARAs/DRA's have been asked by EPA Headquarters to cease any movement into and out of targeted V/V positions, including new details after June 6th unless deemed critical. Note that existing details are not impacted. The following excerpt from a Headquarters memo provides insight as to why a freeze is needed:

"OPM's VERA guidance requires that VERA eligible employees serve in a position for a minimum time specified by OPM (usually 30 days prior to the date of the agency request). Given the current schedule for submitting our V/V business case later this month, please be aware that movement in and out of all targeted positions through reassignments, reorganizations, etc. must cease effective immediately. The prohibition on movement in and out of targeted positions extends to VSIP targeted positions too."

At the ARA meetings in Seattle, Mike Brincks raised a question about the scope and applicability of this guidance/direction with Donna Vizian and all the ARAs including the two SSC Directors. Everyone concurred and agreed that the intent of the OPM guidance is to prevent reassignments into (for ex, with the hope the person would take the buyout or to do someone a favor) or out of targeted positions (for ex, moving someone because you don't want to lose them).

In terms of details, for those that are non-promotional (i.e., not a temp promotion), since the position of record remains the position from which a person was detailed from, there isn't a problem.

- <!--[if !supportLists]--><!--[endif]-->So bottom line – no reassignments or temp promotions into or out of targeted positions.
- <!--[if !supportLists]--><!--[endif]-->Details/reassignments that don't fall into those categories are OK and can proceed.

We appreciate your patience, consideration and support as we all make our way through this process.

Pat Price
Human Resources Officer
EPA – Region 7
Office of Policy & Management
Human Capital Management Branch
11201 Renner Blvd
Lenexa, KS 66219

913 551-7575

Price.patricia@epa.gov

Strengthfinder Themes: Responsibility, Arranger, Developer, Harmony and Focus

Message

From: Storm, Derrick [storm.derrick@epa.gov]
Sent: 6/1/2017 7:34:30 PM
To: Price, Patricia [price.patricia@epa.gov]; Smocks, Carla [Smocks.Carla@epa.gov]; Dunbar, Danielle [dunbar.danielle@epa.gov]
Subject: Agency's Workforce Shaping through Voluntary Early Retirement and Separation Incentive Payment Authorities (VERA/VSIP)
Sensitivity: Company Confidential

FYI,
union notice went out a few minutes ago re VERA/VSIP.

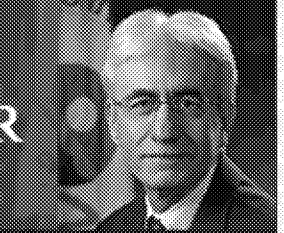
Best,

Bob

Robert D. Coomber
Senior Labor Attorney
Labor and Employee Relations Division
Desk Phone: (202) 564-0955
Cell Phone: Ex. 6 - Personal Privacy
coomber.robert@epa.gov



MESSAGE FROM THE ACTING DEPUTY ADMINISTRATOR



This email message is being sent to EPA employees.

SUBJECT: Agency's Workforce Shaping through Voluntary Early Retirement and Separation Incentive Payment Authorities (VERA/VSIP)
FROM: Mike Flynn
Acting Deputy Administrator
TO: All EPA Employees

Dear Colleagues,

In my April 17, 2017 memo to EPA senior management, I announced that we were beginning steps to initiate an early out/buyout program with a goal to complete the program by the end of September 2017. I wanted to give you an update on the current status and upcoming steps on the program.

Voluntary Early Retirement Authority (VERA) and Voluntary Separation Incentive Payment Authority (VSIP), often referred to as early outs and buy outs, can help us realign our workforce to meet changing mission

requirements and move toward new models of work. The authority encourages voluntary separations and helps the Agency complete workforce restructuring with minimal disruption to the workforce.

Current Status

The Agency has begun a workforce reshaping effort in which headquarters and regional offices are reviewing their current organizations and analyzing where they can achieve efficiencies. As a result of these analyses, the Agency is planning to use VERA/VSIP where it makes sense and where it is aligned with these efficiencies. We will be working with the Agency's labor unions as we go through the VERA/VSIP process.

Headquarters and regional offices currently are working on VERA/VISIP business cases for their respective organizations. Our Office of Human Resources staff will review and consolidate these business cases into one agency-wide business case which will be submitted to the Office of Personnel Management (OPM) and the Office of Management and Budget (OMB) for approval.

In developing our VERA/VSIP business case, we are considering multiple factors including increasing supervisor to staff ratio; consolidating support functions; restructuring or reducing highly graded supervisory and non-supervisory positions; focusing on core business functions, programmatic and STEM priorities, and consolidating and streamlining programs and functions. Details on the selection criteria for employees in the pool are still being worked out.

Next Steps

We plan to submit our agency-wide VERA/VSIP business case to OPM/OMB for approval later in June, and will work closely with OPM/OMB to help expedite the review process. We will provide you information on what positions will be included in the VERA/VSIP program as soon as possible, likely sometime in July. We expect a limited number of employees will be offered VERA/VSIP, and those who accept a VERA/VSIP offer must leave the Agency by early September 2017.

Please look for additional VERA/VSIP information from your organization's senior leadership soon. In the interim, I have provided you with some helpful links below.

Many thanks for your continued commitment to EPA's mission and public service. I am very proud to work alongside you.

OPM' S VERA/VSIP links:

<http://www.opm.gov/policy-data-oversight/workforce-restructuring/voluntary-early-retirement-authority/>

<http://www.opm.gov/policy-data-oversight/workforce-restructuring/voluntary-separation-incentive-payments/>

Thanks,
Derrick

"The ultimate judge of a person's character is their ability to exceed expectations when little recognition or praise is given."



Derrick M. Storm J.D.
HR Specialist (ER/LR)

EPA Region 7 – Human Capital Management Branch
1.1-F51 – Office

(913) 551-7600 – Office Phone

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Message

From: Flournoy, Luetta [Flournoy.Luetta@epa.gov]
Sent: 6/1/2017 2:39:13 PM
To: Price, Patricia [price.patricia@epa.gov]
Subject: DRAFT Message

Pat – per my Skype message, here's a very rough first draft.

DRAFT: Update on Region 7 VERA/VSIP Proposal

In follow up to the All Hands meeting on May 23rd, each of you should have received a message today from which confirms that the Agency plans to offer VERA/VSIP Subsequent to national discussions with the Unions, an Agency-wide VERA/VSIP package will be submitted to the Office of Personnel Management (OPM) and the Office of Management and Budget (OMB).

Ex. 5 - Deliberative Process

Information is available on R7@Work by clicking on the Admin/HR tab at the top of the page, select Human Resources from the drop down box, and (Need to specify location) to access this information. Once there, you will find information on VERA/VSIP, Federal Retirement Benefits calculators, points of contact for additional information, and VERA/VSIP Frequently Asked Questions (FAQs). We will continue to provide the most up to date information as it applies to EPA Region 7 employees – so stay tuned!! (have the FAQs been updated? This is on the HQs intranet site:

[http://](#) **Ex. 6 - Personal Privacy**

In addition to the information provided on the HR web site, the Shared Service Center will be delivering VERA/VSIP information sessions. Watch for subsequent messages with dates and times.

In partnership with the Unions, we also plan to provide a panel discussion with former Region 7 employees.

If all proceeds as currently planned, the effective date for most employee separations is targeted for September 1, 2017, which is a very aggressive time line. If you are considering applying for VERA/VSIP, NOW is the time to start determining the proper disposition of all of your paper, emails and other electronic documents. Open the following document for a step-by-step process to guide you through: [Need to add](#)

If you have questions about records management, see the contacts listed below.

Find your division or branch records POC here:

[http://](#) **Ex. 6 - Personal Privacy**

List of litigation holds and attorneys: [http://](#) **Ex. 6 - Personal Privacy**

Other Region 7 Contacts:

Records Liaison Officer Maryane Tremaine x7430
CBI Coordinator Carmen Hullaby x7070
Superfund Records/ Lit Room Jolleen Werst x7108
General Law Attorneys
Kate Clever x7293
Karina Borromeo x7675

As a reminder, the following VERA/VSIP definitions and eligibility criteria are provided:

Voluntary Early Retirement Authority (VERA)

Allows agencies to temporarily lower the age and service requirements for retirement eligibility. VERA encourages more voluntary separations and helps the agency complete the needed organizational changes with minimal disruption to the work force. By offering these short term opportunities, an agency can make it possible for employees to receive an immediate annuity years before they would otherwise be eligible.

Voluntary Separation Incentive Payments (VSIP)

Also known as buyout authority, allows agencies that are downsizing or restructuring to offer employees lump-sum payments up to \$25,000 as an incentive to voluntarily separate. The employee must volunteer to separate by resignation, optional retirement, or by voluntary early retirement. By allowing employees to volunteer to leave the Government, agencies can minimize or avoid involuntary separations through the use of costly and disruptive reductions in force (RIFs).

Retirement Eligible

Meets age and service requirements for eligibility for regular retirement without a buy-out.
No reduction in annuity (Except FERS retiring under MRA + 10 years of service)

Optional (Or Regular) Retirement

(Must meet one of the age and service requirements below on the date of separation)

CSRS Eligibility

Age 62 with 5 years of service
Age 60 with 20 years of service
Age 55 with 30 years of service
Age 50 with 20 years of service (law enforcement officer)

FERS Eligibility

Age 62 with 5 years of service
Age 60 with 20 years of service
Minimum Retirement (MRA varies by birth year) with 30 years of service
MRA with 10 years of service (with reduced annuity)

VERA Eligibility:

The employee must:

Meet the minimum age and service requirements and be:

- At least age 50 with at least 20 years of creditable federal service, or
- Any age with at least 25 years of creditable federal service;

Have served in a position covered by the OPM authorization for the minimum time specified by OPM (usually 30 days prior to the date of the agency request);

Serve in a position targeted by the agency's VERA plan; and

Separate by the close of the early-out period.

VSIP Eligibility:

The employee must:

Meet the minimum age and service requirements and be:

- At least age 50 with at least 20 years of creditable federal service, or

- Any age with at least 25 years of creditable federal service;

Have served in a position covered by the OPM authorization for the minimum time specified by OPM (usually 30 days prior to the date of the agency request);

Serve in a position targeted by the agency's VERA plan; and

Separate by the close of the early-out period.

Message

From: Krehbiel, Ben [Krehbiel.Ben@epa.gov]
Sent: 5/11/2017 1:30:44 PM
To: Price, Patricia [price.patricia@epa.gov]; Kohler, Carla [Kohler.Carla@epa.gov]
CC: Brincks, Mike [brincks.mike@epa.gov]
Subject: Safe Positions

Pat,

It may or may not come up in today's meeting, but I'll lean on you for your best interpretation of 'Safe Positions' --- the information I've received is below...you have anything else or any other thoughts on this/these definitions? The deputies didn't seem terribly interested, but it does provide flexibility we didn't have in 2014.

From Monday—

Question: What is a “safe position” as mentioned in OPM’s VERA and VSIP guidance?

Answer: A safe position is a position that isn't specifically targeted for elimination or restructuring but would allow for the placement of another employee who's targeted position would be eliminated or restructured if vacated under V-V. Basically, it's a flexibility that allows the agency to cast a wide net to encourage voluntary attrition while still meeting the elimination/restructuring requirements of the V-V authorities. Of course, this option assumes the employees who remain would meet the qualifications for the safe positions. The organization's business case must identify and explain any “safe position” plans.

Example

The organization needs to eliminate and/or restructure five, GS-343-11/12 positions in Division A: Branches B and C. The manager offers V-V to all GS-343-11/12 positions in the organization. Five people across the organization accept V-V and separate. Division A then reassigns any surplus employees remaining in Branches B and C and eliminates/restructures five positions.

*****from a week or two ago*****

Safe Positions determination / OPM guidance, clarification:

The bottom line is that you can include “safe” positions in a VSIP offering to the extent that they may provide a placement for an employee whose position is subject to elimination/restructuring. Here's a working definition:

“Safe” positions: positions that are not the main focus for reduction/restructuring/elimination, but which are included in the VSIP offering only to the extent that they may provide placement for an employee whose position will be reduced/restructured/eliminated.

From: Helm, Arron
To: ARAs
Sent: Monday, May 01, 2017 11:27 AM
Subject: OPM Response to V/V Questions

All, here is the response I received today to my hypothetical “scenario” questions to OPM.

Good Morning Mr. Helm:

I'm Cathy Thornton – I work for Mike Mahoney in Hiring Policy, handling various workforce reshaping areas – VERA/VSIP, RIF, TOF, etc.

Since there is a long string of emails here I will reinsert your most recent questions and provide answers immediately below:

Thank you – I'd like to ask a follow up for clarification.

The March 17th 2017 published guidance on VERA and VSIP simply states that VERA or VSIP may be offered to “safe” positions in order to open up placement opportunities for others in surplus positions. The response below seems to indicate that “safe” positions must be restructured or modified in some way in order to use them as placement opportunities for people in surplus positions which would be eliminated in a restructuring. This does not seem to be consistent. For clarity I will pose a couple of scenarios:

1. An HR organization will be restructuring to reduce staffing and recruitment capacity while increasing capacity in the benefits and retirement areas. Under the new guidance, can VERA/VSIP be offered to employees in Staffing and Recruitment AND Benefits and Retirement so that the Agency can then move any remaining excess staffing/recruitment specialists into benefits and retirement positions vacated through VERA/VSIP? (for purposes of the example assume qualifications are not an issue).

ANSWER: YES, this is precisely the kind of situation in which the “safe position” provision is intended for. You are correct that in including such scenarios in the plan you submit to OPM, they are always, of course, subject to qualifications being cleared.

1. A scientific organization focusing on Superfund Site Remediation is a safe organization, but the office will be reducing capacity and restructuring another organization where staff are in similar occupations with similar qualifications. This will result in the elimination of several supervisory positions in the latter organization. Can VERA/VSIP be offered to supervisors in both organizations, eliminating those that vacate in the latter, and moving supervisors who remain from the affected organization to any slots vacated in the Remediation group that is going to remain as is?

Answer: absolutely. Delaying and addressing supervisory ratio issues in a reorganization situation clearly meets one of OPM's intended uses under the reshaping/restructuring provisions of the VERA/VSIP statute.

Thanks for your assistance and helping to clarify this for us.

We hope this provides the clarification you were seeking, and please let us know if you need more.

Regards,
Cathy

Ben Krehbiel
Deputy ARA
EPA Region 7
913.551.7106

Message

From: Krehbiel, Ben [Krehbiel.Ben@epa.gov]
Sent: 5/10/2017 6:54:08 PM
To: Price, Patricia [price.patricia@epa.gov]; Dunbar, Danielle [dunbar.danielle@epa.gov]; Flournoy, Luetta [Flournoy.Luetta@epa.gov]
CC: Kohler, Carla [Kohler.Carla@epa.gov]
Subject: VERA_VSIP_Region7_5_10_2017_Final Rev.pptx
Attachments: VERA_VSIP_Region7_5_10_2017_Final Rev.pptx

We've made some changes / consolidated some slides –

PLEASE fix the detail on slide 8 to reflect 'as of 9/30' for retirement eligible and VERA/Early eligibles....

We fixed the total column, but need the divisions to add up to those totals. Thx

Ben

R7 BOD Briefing

VERA/VSIP – May 11, 2017



DEFINITIONS

- **Voluntary Early Retirement Authority (VERA)**

- Allows agencies to temporarily lower the age and service requirements for retirement eligibility. VERA encourages more voluntary separations and helps the agency complete the needed organizational changes with minimal disruption to the work force. By offering these short term opportunities, an agency can make it possible for employees to receive an immediate annuity years before they would otherwise be eligible.

- **Voluntary Separation Incentive Payments (VSIP)**

- Also known as buyout authority, allows agencies that are downsizing or restructuring to offer employees lump-sum payments up to \$25,000 as an incentive to voluntarily separate. The employee must volunteer to separate by resignation, optional retirement, or by voluntary early retirement. By allowing employees to volunteer to leave the Government, agencies can minimize or avoid involuntary separations through the use of costly and disruptive reductions in force (RIFs).

VERA Eligibility

The employee must:

- Meet the minimum age and service requirements and be:
 - At least age 50 with at least 20 years of creditable federal service, or
 - Any age with at least 25 years of creditable federal service;
- Have served in a position covered by the OPM authorization for the minimum time specified by OPM (usually 30 days prior to the date of the agency request);
- Serve in a position targeted by the agency's VERA plan; and
- Separate by the close of the early-out period.

VSIP Eligibility

The employee must:

- Be serving in an appointment without time limit;
- Be currently employed by the executive branch of the federal government for a continuous period of at least 3 years;
- Be serving in a position covered by the agency VSIP plan (i.e., in the specific geographic area, organization, series and grade); and
- Apply for and receive VSIP approval.

Ex. 5 - Deliberative Process

5

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

5

Ex. 5 - Deliberative Process

Message

From: Price, Patricia [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=51C2C9444160467DAFC12D77F98E994B-PRICE, PATR]
Sent: 10/12/2017 5:52:51 PM
To: Price, Patricia [price.patricia@epa.gov]
Subject: FW: R7 freeze on internal personnel actions
Attachments: Region 7 Actions with the SSC.XLSX; Region 7 Actions with the Customer.xlsx

Pat Price
Human Resources Officer
EPA – Region 7
Office of Policy & Management
Human Capital Management Branch
11201 Renner Blvd
Lenexa, KS 66219
913 551-7575
Price.patricia@epa.gov

Strengthfinder Themes: Responsibility, Arranger, Developer, Harmony and Focus

From: Bonner, Jerome
Sent: Wednesday, September 27, 2017 1:27 PM
To: Brincks, Mike <brincks.mike@epa.gov>
Cc: Price, Patricia <price.patricia@epa.gov>; Dunbar, Danielle <dunbar.danielle@epa.gov>; Krehbiel, Ben <Krehbiel.Ben@epa.gov>; Smocks, Carla <Smocks.Carla@epa.gov>; Bonner, Jerome <Bonner.Jerome@epa.gov>
Subject: RE: R7 freeze on internal personnel actions

Hi Mike

Please find attached 2 reports. The first report illustrates all R7 personnel actions residing in the HRSSC. We do not have the IT Branch Chief action referenced below.

The second report illustrates personnel action residing with R7. Please note several of these actions are fairly old and I recommend your HR Office review the actions to determine whether they should be deleted.

I believe Pat is aware, but both of these reports may be generated locally using the recently created HRSSC Dashboards.

Thanks
JB

Jerome W. Bonner
Environmental Protection Agency
Office of Administration and Resources Management - Cincinnati
Director, Human Resources
Cincinnati Human Resources Shared Service Center
Tel: 513-569-7950

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From: Smocks, Carla
Sent: Wednesday, September 27, 2017 1:50 PM
To: Brincks, Mike <brincks.mike@epa.gov>; Bonner, Jerome <Bonner.Jerome@epa.gov>
Cc: Price, Patricia <price.patricia@epa.gov>; Dunbar, Danielle <dunbar.danielle@epa.gov>; Krehbiel, Ben <Krehbiel.Ben@epa.gov>
Subject: RE: R7 freeze on internal personnel actions

Thanks Mike and Jerome.

Carla

From: Brincks, Mike
Sent: Wednesday, September 27, 2017 12:39 PM
To: Bonner, Jerome <Bonner.Jerome@epa.gov>; Smocks, Carla <Smocks.Carla@epa.gov>
Cc: Price, Patricia <price.patricia@epa.gov>; Dunbar, Danielle <dunbar.danielle@epa.gov>; Krehbiel, Ben <Krehbiel.Ben@epa.gov>
Subject: RE: R7 freeze on internal personnel actions

That would be good Jerome.

Just to clarify, this freeze only applies to the internal actions listed. We received a hiring freeze waiver from the Deputy Administrator (and Donna V) to hire an IT Branch Chief and we plan to post that both internal/external to EPA, so that one would not be not subject to this freeze. Not sure if that is the report. It would be good for us to review and let you know which are ok/not ok.

Thanks Jerome.



Mike Brincks
Assistant Regional Administrator
Office of Policy & Management
US Environmental Protection Agency, Region 7
11201 Renner Boulevard
Lenexa, KS 66219
Office: 913-551-7799
brincks.mike@epa.gov

From: Bonner, Jerome
Sent: Wednesday, September 27, 2017 12:29 PM
To: Smocks, Carla <Smocks.Carla@epa.gov>

Cc: Price, Patricia <price.patricia@epa.gov>; Dunbar, Danielle <dunbar.danielle@epa.gov>; Brincks, Mike <brincks.mike@epa.gov>; Krehbiel, Ben <Krehbiel.Ben@epa.gov>

Subject: RE: R7 freeze on internal personnel actions

Hi Carla

Would it help if I sent you a report containing all recruit and non-recruit actions we have for R7? If so desired, I could probably get you the report today or early in the morning.

Thanks

JB

Jerome W. Bonner
Environmental Protection Agency
Office of Administration and Resources Management - Cincinnati
Director, Human Resources
Cincinnati Human Resources Shared Service Center
Tel: 513-569-7950
Mobile: 513-518-4849

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From: Smocks, Carla
Sent: Wednesday, September 27, 2017 1:26 PM
To: Bonner, Jerome <Bonner.Jerome@epa.gov>
Cc: Price, Patricia <price.patricia@epa.gov>; Dunbar, Danielle <dunbar.danielle@epa.gov>; Smocks, Carla <Smocks.Carla@epa.gov>; Brincks, Mike <brincks.mike@epa.gov>; Krehbiel, Ben <Krehbiel.Ben@epa.gov>
Subject: FW: R7 freeze on internal personnel actions

Hello Jerome,

Please see the attached guidance that R7 is sending to our Senior Staff and Deputies. We are requesting your team's assistance in ensuring that R7 adheres to the freeze in place. Please do not process any actions received from R7 relating to the guidance without first checking with Pat Price, HRO; Ben Krehbiel, DARA; or Mike Brincks, ARA. Due to the process for actions, R7 HR and Senior Staff are not always aware of actions. We appreciate your support as we move forward post VERA/VSIP.

Carla Smocks, Acting HRO for Pat Price

From: Brincks, Mike
Sent: Tuesday, September 26, 2017 4:59 PM
To: R7 Senior Staff <R7_Senior_Staff@epa.gov>; R7 Deputies <R7_Deputies@epa.gov>
Cc: Price, Patricia <price.patricia@epa.gov>; Kohler, Carla <Kohler.Carla@epa.gov>
Subject: R7 freeze on internal personnel actions

Senior Staff & Deputies,

As you know, under Final Hiring Guidance issued by HQ (OARM) back in February, NPMs and Regions have been allowed to move forward on the following types of internal personnel actions:

- **Internal Reassignments**
- **Noncompetitive Temporary Details (same grade)**
- **Temporary Promotion Details (not to exceed 120 days)**

That guidance further stipulated that to proceed with these types of actions first requires a determination by the RA that the position is critical to fill in that it meets the highest priority needs of the agency or to ensure essential services are not interrupted. In R7, we developed a standard form to request such determinations from the RA.

https://usepa.sharepoint.com/sites/R7_Work/seniorstaff/Shared%20Documents/Region7%20Hiring%20Exception%20Request.pdf?web=1

Subsequent to the issuance of the February 2017 guidance, the agency conducted a VERA/VSIP (early-out/buy-out) process. Twenty nine (29) R7 personnel separated as a result of VERA/VSIP(VV).

In an effort to chart a collective post-VV path forward, today Ed, Karen and I met to discuss the need to develop a process to identify current (and future) critical vacancies resulting from VV and normal attrition - and how to best fill those positions internally on either a temporary or permanent basis until such time as the agency hiring freeze is lifted. We expect to share a draft with you and finalize this new process within the next two weeks.

In the interim and effective immediately, the region is putting our own freeze on any internal Reassignments, Noncompetitive Details and Temporary Promotion Details that have not yet been filled. The only exception to this freeze will be for Noncompetitive Details and Temporary Promotion Details that can be filled internal to your respective division or office (ex., PLMG could only temporarily detail a person within PLMG). For these types of within division/office exceptions, please use the same standard form mentioned above.

Thanks in advance for your understanding and patience.



Mike Brincks
Assistant Regional Administrator
Office of Policy & Management
US Environmental Protection Agency, Region 7
11201 Renner Boulevard
Lenexa, KS 66219
Office: 913-551-7799
brincks.mike@epa.gov

Message

From: Price, Patricia [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=51C2C9444160467DAFC12D77F98E994B-PRICE, PATR]
Sent: 9/7/2017 5:44:09 PM
To: Dunbar, Danielle [dunbar.danielle@epa.gov]; Smocks, Carla [Smocks.Carla@epa.gov]
Subject: FW: Post VERA/VSIP update and next Steps
Attachments: Workforce Readiness and Restructuring.docx; R7 Separating Employee Current POC.docx

FYI

Pat Price
Human Resources Officer
EPA – Region 7
Office of Policy & Management
Human Capital Management Branch
11201 Renner Blvd
Lenexa, KS 66219
913 551-7575
Price.patricia@epa.gov
Strengthfinder Themes: Responsibility, Arranger, Developer, Harmony and Focus

From: Brincks, Mike
Sent: Thursday, September 07, 2017 12:37 PM
To: R7 Senior Staff <R7_Senior_Staff@epa.gov>; R7 Deputies <R7_Deputies@epa.gov>
Cc: Price, Patricia <price.patricia@epa.gov>; Flournoy, Luetta <Flournoy.Luetta@epa.gov>
Subject: Post VERA/VSIP update and next Steps

Good afternoon,

Many of us are still adjusting to the recent departure of a number of our esteemed colleagues under VERA/VSIP and wondering what's next.

As noted in Ed Chu's July 14th all hands message, "we will find a way to fill the most critical gaps, repurpose our work, and in some cases, make conscious decisions to stop doing work that is not necessary for our core mission or work that our state and local government partners are equipped and legally able to manage. In all we do moving forward, please look for the most efficient and effective ways to get things done." Region 7 and the Agency as a whole, are taking a hard look at the priority, mission critical work that will continue to be done and how it will be done (think Lean).

The Agency remains under a hiring freeze, which presently limits actions to: 1) Internal Reassignments, 2) Noncompetitive Temporary Details, and 3) Temporary Promotions. For critical resource needs, upon approval from the DRA/RA an exception to the hiring freeze may be requested from EPA Headquarters.

Except for several Superfund positions, other **positions vacated under Region 7's 2017 VERA/VSIP Plan** must also be restructured before refilling the position even temporarily (i.e., details) based on current guidance. Below are the four options for restructuring:

- Change from supervisory to non-supervisory.
- Decrease the grade and/or full performance level (i.e., at least one grade level lower than the current position).
- Change the series of the position. Note: Changing an interdisciplinary position (e.g. from scientist to engineer) does not qualify.
- Significantly change the duties of the position (at least 25%) if the series and grade are to remain the same.

Since it will take time to determine critical resource needs, request an exception to the hiring freeze, and restructure any of these positions vacated as a result of VERA/VSIP, the following information is provided regarding interim points of contact for those positions left vacant due to VERA/VSIP:

For staff positions vacated under VERA/VSIP, contact their supervisor regarding questions about their areas of responsibility. See attached list of departed staff/supervisor.

For management/supervisory positions vacated:

AWMD:

RCRA Corrective Action and Permits Section (vice Jeff Johnson): Contact Don Lininger.

ENST:

Dock Management (Shipping/Receiving/Inventory) (vice a portion of Bob Wiggans):
Contact Cecilia Tapia/Josh Tapp/Margie St.Germain.

WWPD:

Watershed Planning and Implementation Branch (vice Steve Kovac): Contact Glenn Curtis.
Water Quality Management Branch (vice John DeLashmit): Contact Jeff Robichaud.
Also, continue to contact Diane Huffman regarding "WWPD Deputy" questions.

Watch for further updates as we learn more about next steps here in Region 7! **If you have questions, please contact Pat Price, R7 Human Resources Officer. x 7575**

Also, see the attachment for guidance regarding:

- Details
- Reassignments
- Temporary Promotions
- In-Service Placement
- Alternative Staffing Options (Job Swap, Skills Marketplace)
- Reorganizations (Note: Per the hiring freeze guidance, reorganizations are presently on hold as well)
- Management Rights
- Position Descriptions
- Frequently Asked Questions

Message

From: Price, Patricia [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=51C2C9444160467DAFC12D77F98E994B-PRICE, PATR]
Sent: 6/13/2017 8:09:57 PM
To: R7 Senior Staff [R7_Senior_Staff@epa.gov]; R7 Deputies [R7_Deputies@epa.gov]
CC: Kohler, Carla [Kohler.Carla@epa.gov]; Flournoy, Luetta [Flournoy.Luetta@epa.gov]
Subject: Follow-up Regarding VERA/VSIP Hiring Freeze Clarification

Good Afternoon,

The following addresses the clarification regarding VERA/VSIP Hiring Freeze on movement into and out of target V/V positions as stated below:

The ARAs/DRAs have been asked by EPA Headquarters to cease any movement into and out of targeted V/V positions, including new details after June 6th unless deemed critical. Note that existing details are not impacted. The following excerpt from a Headquarters memo provides insight as to why a freeze is needed:

"OPM's VERA guidance requires that VERA eligible employees serve in a position for a minimum time specified by OPM (usually 30 days prior to the date of the agency request). Given the current schedule for submitting our V/V business case later this month, please be aware that movement in and out of all targeted positions through reassignments, reorganizations, etc. must cease effective immediately. The prohibition on movement in and out of targeted positions extends to VSIP targeted positions too."

At the ARA meetings in Seattle, Mike Brincks raised a question about the scope and applicability of this guidance/direction with Donna Vizian and all the ARAs including the two SSC Directors. Everyone concurred and agreed that the intent of the OPM guidance is to prevent reassignments into (for ex, with the hope the person would take the buyout or to do someone a favor) or out of targeted positions (for ex, moving someone because you don't want to lose them).

In terms of details, for those that are non-promotional (i.e., not a temp promotion), since the position of record remains the position from which a person was detailed from, there isn't a problem.

- So bottom line – no reassignments or temp promotions into or out of targeted positions.
- Details/reassignments that don't fall into those categories are OK and can proceed.

We appreciate your patience, consideration and support as we all make our way through this process.

Pat Price
Human Resources Officer
EPA – Region 7
Office of Policy & Management
Human Capital Management Branch
11201 Renner Blvd
Lenexa, KS 66219
913 551-7575
Price.patricia@epa.gov

Strengthfinder Themes: Responsibility, Arranger, Developer, Harmony and Focus

Message

From: Price, Patricia [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=51C2C9444160467DAFC12D77F98E994B-PRICE, PATR]
Sent: 6/8/2017 2:18:52 PM
To: Flournoy, Luetta [Flournoy.Luetta@epa.gov]
Subject: RE: Updated Version

Pat Price
Human Resources Officer
EPA – Region 7
Office of Policy & Management
Human Capital Management Branch
11201 Renner Blvd
Lenexa, KS 66219
913 551-7575
Price.patricia@epa.gov
Strengthfinder Themes: Responsibility, Arranger, Developer, Harmony and Focus

From: Flournoy, Luetta
Sent: Thursday, June 08, 2017 9:01 AM
To: Price, Patricia <price.patricia@epa.gov>
Subject:

Update on Region 7 VERA/VSIP Proposal

In follow up to the All Hands meeting on May 23rd, each of you should have received an EPA Mass Mailer e-mail from Acting Deputy Administrator Mike Flynn on June 1, 2017, confirming that the Agency plans to offer VERA/VSIP. Subsequent to national discussions with the Unions, an Agency-wide VERA/VSIP package will be submitted in late June to the Office of Personnel Management (OPM) and the Office of Management and Budget (OMB).

Upon approval by HQ, OPM and OMB, Region 7 plans to offer a total of 45 VERA/VSIP opportunities to 168 non-SES positions which include most - but not all - of those who are eligible for either a Regular Retirement or an VERA (Early) Retirement. If you have questions regarding your potential eligibility for VERA/VSIP, please contact the Deputy director in your division/office. As with other federal workforce restructuring authorities, the agency has the ability to reassign employees to minimize the impact of its restructuring efforts.

In developing the VERA/VSIP business case, the agency is considering multiple factors including increasing supervisor to staff ratio; consolidating support functions; restructuring or reducing highly graded supervisory and non-supervisory positions; focusing on core business functions, programmatic and STEM priorities, and consolidating and streamlining programs and functions.

More information is available at the Agency's current VERA/VSIP site:

[http://](#) **Ex. 6 - Personal Privacy** Please check this site for updates as more information and tools become available. We will continue to provide the most up to date information as it applies to EPA Region 7 employees – so stay tuned!!

In addition to the information provided the VERA/VSIP site, the Shared Service Center will be delivering VERA/VSIP information sessions. Please watch for subsequent messages with dates and times.

In partnership with the Unions, Region 7 also plans to provide a panel discussion with former Region 7 employees.

If all proceeds as currently planned, the agency's effective date for most employee separations is targeted for early September 2017, which is a very aggressive timeline. If you are considering applying for VERA/VSIP, NOW is the time to start any due diligence and evaluation.

In addition, now is also a good time to get a start on determining the proper disposition of all of your paper, emails and other electronic documents. Records management guidance is available on

R7@Work: [http://\[redacted\]](http://[redacted]) **Ex. 6 - Personal Privacy** If you have questions about records management, see the contacts listed below.

Division or branch records POC:

[http://\[redacted\]](http://[redacted]) **Ex. 6 - Personal Privacy**

Litigation holds and attorneys: [http://\[redacted\]](http://[redacted]) **Ex. 6 - Personal Privacy**

Other Region 7 Records Contacts:

Records Liaison Officer: Jolleen Kieslich x7108

CBI Coordinator: Carmen Hullaby x7070

General Law Attorneys

Kate Clever x7293

Karina Borromeo x7675

As a reminder, the following VERA/VSIP definitions and eligibility criteria are provided:

Voluntary Early Retirement Authority (VERA)

Allows agencies to temporarily lower the age and service requirements for retirement eligibility. VERA encourages more voluntary separations and helps the agency complete the needed organizational changes with minimal disruption to the work force. By offering these short term opportunities, an agency can make it possible for employees to receive an immediate annuity years before they would otherwise be eligible.

Voluntary Separation Incentive Payments (VSIP)

Also known as buyout authority, allows agencies that are downsizing or restructuring to offer employees lump-sum payments up to \$25,000 as an incentive to voluntarily separate. The employee must volunteer to separate by resignation, optional retirement, or by voluntary early retirement. By allowing employees to volunteer to leave the Government, agencies can minimize or avoid involuntary separations through the use of costly and disruptive reductions in force (RIFs).

Retirement Eligible

Meets age and service requirements for eligibility for regular retirement without a buy-out.

No reduction in annuity (Except FERS retiring under MRA + 10 years of service)

Optional (Or Regular) Retirement

(Must meet one of the age and service requirements below on the date of separation)

CSRS Eligibility

Age 62 with 5 years of service

Age 60 with 20 years of service

Age 55 with 30 years of service

Age 50 with 20 years of service (law enforcement officer)

FERS Eligibility

Age 62 with 5 years of service

Age 60 with 20 years of service

Minimum Retirement (MRA varies by birth year) with 30 years of service

MRA with 10 years of service (with reduced annuity)

VERA Eligibility:

The employee must:

Meet the minimum age and service requirements and be:

- At least age 50 with at least 20 years of creditable federal service, or

- Any age with at least 25 years of creditable federal service;

Have served in a position covered by the OPM authorization for the minimum time specified by OPM (usually 30 days prior to the date of the agency request);

Serve in a position targeted by the agency's VERA plan; and

Separate by the close of the early-out period.

VSIP Eligibility:

The employee must:

Meet the minimum age and service requirements and be:

- At least age 50 with at least 20 years of creditable federal service, or

- Any age with at least 25 years of creditable federal service;

Have served in a position covered by the OPM authorization for the minimum time specified by OPM (usually 30 days prior to the date of the agency request);

Serve in a position targeted by the agency's VERA plan; and

Separate by the close of the early-out period.

For additional information, please contact the SSC/Benefits Office Points of Contact listed below:

Sue Mairose

Branch Chief, Employee Benefits

Environmental Protection Agency

Cincinnati HR Shared Service Center

Cheryl Thomas

Lead Human Resources Benefits Specialist

U.S. Environmental Protection Agency

Cincinnati HR Shared Services Center

Or

Benefits Common Line (513) 569-7699

Benefits email box: CIN_HRSSC_Benefits_Central@epa.gov


Again, as more information becomes available, we will provide you with the latest updates in assisting you with this most important and time critical process.

Message

From: Price, Patricia [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=51C2C9444160467DAFC12D77F98E994B-PRICE, PATR]
Sent: 6/1/2017 3:27:11 PM
To: Flournoy, Luetta [Flournoy.Luetta@epa.gov]
Subject: RE: DRAFT Message

<!--[if lte mso 15 || CheckWebRef]-->

Price, Patricia has shared a OneDrive for Business file with you. To view it, click the link below.

 HCMB_Bi-MonthlyMeeting6_1_2017.docx

<!--[endif]-->

Luetta,

Thank you. I just ended my call with Sue Mairose and Cheryl Thomas at the SSC on discussing the draft SSC & Regional actions for VERA/VSIP. I believe the draft is quite inclusive. SSC had asked if we would promote their Common Line and email box. Therefore, I will include that along with POCs. They do not have any additional information right now as well. However, I agreed that we would keep them posted with our communications.

I am attaching the discussion items I have down for the HCMB Bi-Monthly meeting at 1.00 p.m.

Pat Price
Human Resources Officer
EPA – Region 7
Office of Policy & Management
Human Capital Management Branch
11201 Renner Blvd
Lenexa, KS 66219
913 551-7575
Price.patricia@epa.gov

From: Flournoy, Luetta
Sent: Thursday, June 01, 2017 9:39 AM
To: Price, Patricia <price.patricia@epa.gov>
Subject: DRAFT Message

Pat – per my Skype message, here's a very rough first draft.

DRAFT: Update on Region 7 VERA/VSIP Proposal

In follow up to the All Hands meeting on May 23rd, each of you should have received a message today from which confirms that the Agency plans to offer VERA/VSIP Subsequent to national discussions with the Unions, an Agency-wide VERA/VSIP package will be submitted to the Office of Personnel Management (OPM) and the Office of Management and Budget (OMB).

(Decision needed on what to share) Subject to approval by OPM and OMB, Region 7 plans to offer a total of 45 VERA/VSIP opportunities for up to 168 non-SES positions which are eligible for either a Regular Retirement or an Early Retirement. The following occupational series are not the focus for VERA/VSIP in Region 7: SES, GS-510, GS-511, GS-

1102, GS-1109, GS-2210 as well as Phased Retirees. Region 7 will not be offering VSIP to employees not currently eligible for Regular Retirement or an Early Retirement. As with other federal workforce restructuring authorities, the agency has the ability to reassign employees to minimize the impact of its restructuring efforts. Major VERA/VSIP themes for Region 7 are:

- Consolidate or reduce administrative or support functions
- Restructure or reduce highly graded supervisory and non-supervisory positions
- Restructure to focus on core business functions (administrative support)

Information is available on R7@Work by clicking on the Admin/HR tab at the top of the page, select Human Resources from the drop down box, and (Need to specify location) to access this information. Once there, you will find information on VERA/VSIP, Federal Retirement Benefits calculators, points of contact for additional information, and VERA/VSIP Frequently Asked Questions (FAQs). We will continue to provide the most up to date information as it applies to EPA Region 7 employees – so stay tuned!! (have the FAQs been updated? This is on the HQs intranet site:

[http://](#) **Ex. 6 - Personal Privacy**

In addition to the information provided on the HR web site, the Shared Service Center will be delivering VERA/VSIP information sessions. Watch for subsequent messages with dates and times.

In partnership with the Unions, we also plan to provide a panel discussion with former Region 7 employees.

If all proceeds as currently planned, the effective date for most employee separations is targeted for September 1, 2017, which is a very aggressive time line. If you are considering applying for VERA/VSIP, NOW is the time to start determining the proper disposition of all of your paper, emails and other electronic documents. Open the following document for a step-by-step process to guide you through: Need to add

If you have questions about records management, see the contacts listed below.

Find your division or branch records POC here:

[http://](#) **Ex. 6 - Personal Privacy**

List of litigation holds and attorneys: [http://](#) **Ex. 6 - Personal Privacy**

Other Region 7 Contacts:

Records Liaison Officer Maryane Tremaine x7430
CBI Coordinator Carmen Hullaby x7070
Superfund Records/ Lit Room Jolleen Werst x7108
General Law Attorneys
Kate Clever x7293
Karina Borromeo x7675

As a reminder, the following VERA/VSIP definitions and eligibility criteria are provided:

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Allows agencies to temporarily lower the age and service requirements for retirement eligibility. VERA encourages more voluntary separations and helps the agency complete the needed organizational changes with minimal disruption to the work force. By offering these short term opportunities, an agency can make it possible for employees to receive an immediate annuity years before they would otherwise be eligible.

Voluntary Separation Incentive Payments (VSIP)

Also known as buyout authority, allows agencies that are downsizing or restructuring to offer employees lump-sum payments up to \$25,000 as an incentive to voluntarily separate. The employee must volunteer to separate by

resignation, optional retirement, or by voluntary early retirement. By allowing employees to volunteer to leave the Government, agencies can minimize or avoid involuntary separations through the use of costly and disruptive reductions in force (RIFs).

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No reduction in annuity (Except FERS retiring under MRA + 10 years of service)

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- At least age 50 with at least 20 years of creditable federal service, or
- Any age with at least 25 years of creditable federal service;

Have served in a position covered by the OPM authorization for the minimum time specified by OPM (usually 30 days prior to the date of the agency request);

Serve in a position targeted by the agency's VERA plan; and

Separate by the close of the early-out period.

VSIP Eligibility:

The employee must:

Meet the minimum age and service requirements and be:

- At least age 50 with at least 20 years of creditable federal service, or
- Any age with at least 25 years of creditable federal service;

Have served in a position covered by the OPM authorization for the minimum time specified by OPM (usually 30 days prior to the date of the agency request);

Serve in a position targeted by the agency's VERA plan; and

Separate by the close of the early-out period.

Message

From: Price, Patricia [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=51C2C9444160467DAFC12D77F98E994B-PRICE, PATR]
Sent: 5/10/2017 4:57:38 PM
To: Brincks, Mike [brincks.mike@epa.gov]; Krehbiel, Ben [Krehbiel.Ben@epa.gov]
CC: Kohler, Carla [Kohler.Carla@epa.gov]; Dunbar, Danielle [dunbar.danielle@epa.gov]; Klinker, Wendy [Klinker.Wendy@epa.gov]
Subject: Updated BOD Powerpoint for VV
Attachments: VERA_VSIP_Region7_5_10_2017_Final Rev1147am version.pptx

Mike,

Per previous email attached is the updated version reviewed and discussed as a Team.

Let me know if you have any questions.

Pat Price
Human Resources Officer
EPA – Region 7
Office of Policy & Management
Human Capital Management Branch
11201 Renner Blvd
Lenexa, KS 66219
913 551-7575
Price.patricia@epa.gov

R7 RA/DRA Briefing

VERA/VSIP – May 11, 2017



DEFINITIONS

- **Voluntary Early Retirement Authority (VERA)**

- Allows agencies to temporarily lower the age and service requirements for retirement eligibility. VERA encourages more voluntary separations and helps the agency complete the needed organizational changes with minimal disruption to the work force. By offering these short term opportunities, an agency can make it possible for employees to receive an immediate annuity years before they would otherwise be eligible.

- **Voluntary Separation Incentive Payments (VSIP)**

- Also known as buyout authority, allows agencies that are downsizing or restructuring to offer employees lump-sum payments up to \$25,000 as an incentive to voluntarily separate. The employee must volunteer to separate by resignation, optional retirement, or by voluntary early retirement. By allowing employees to volunteer to leave the Government, agencies can minimize or avoid involuntary separations through the use of costly and disruptive reductions in force (RIFs).

VERA Eligibility

The employee must:

- Meet the minimum age and service requirements and be:
 - At least age 50 with at least 20 years of creditable federal service, or
 - Any age with at least 25 years of creditable federal service;
- Have served in a position covered by the OPM authorization for the minimum time specified by OPM (usually 30 days prior to the date of the agency request);
- Serve in a position targeted by the agency's VERA plan; and
- Separate by the close of the early-out period.

VSIP Eligibility

The employee must:

- Be serving in an appointment without time limit;
- Be currently employed by the executive branch of the federal government for a continuous period of at least 3 years;
- Be serving in a position covered by the agency VSIP plan (i.e., in the specific geographic area, organization, series and grade); and
- Apply for and receive VSIP approval.

Why VERA/VSIP?

- Prepares Region to meet the requirements of Exec. Order A Comprehensive Plan for Reorganizing the Executive Branch.
- Provides flexibility to Region 7 to restructure workforce to align with Agency Mission and current priorities.
- R7's plan has three primary goals: (1) better balance in our grade levels; (2) better supervisor-to-staff ratio; and (3) to reshape our work & workforce to meet current and future challenges with new skill sets and new approaches to our work
- Can help to avoid more disruptive workforce planning tools.
- VERA/VSIP in 2014 allowed Region to bring in new entry level employees in scientific series with new skill sets, earlier in career who can more easily be cross trained and reassigned throughout the organization to support new priorities.

VERA/VSIP Justification

- Agency focus on core legal requirements will likely eliminate functions.
- Executive Orders will likely reduce federal oversight of select programs.
- Agency priorities and program funding will shift. Reducing the number of higher-graded and administrative employees will allow flexibility to restructure workforce to align with Agency priorities.
- Current rate of retirements without incentives will not permit the Region to meet the changing Agency focus.

Alternatives to VERA/VSIP

Action	Discussion
Detail employees to other Agencies	Temporarily reduces salary and benefit costs. Unlikely given government wide changes. Low impact to morale.
Directed reassignments	No reduction in salary and benefit costs. Management can permanently move employees to different functions.
Freeze hiring and promotion actions	Temporarily reduces salary and benefit costs. Is difficult in highly technical fields. Potential high impact to morale.
Furlough	Temporarily reduces salary and benefit costs. High impact to morale.
Modify or waive qualifications	No reduction in salary and benefit costs. Is difficulty in highly technical fields. Potential high impact to morale.
Separate Temp. Employees/Reemployed Annuitants	Very few employees in Region in these categories. Permanent reduces salary and benefit costs. High impact to morale.
Train employees for other positions.	No reduction in salary and benefits costs. Increased cost for training. Is difficult in highly and time consuming in technical fields. Low impact to morale.
Voluntary change to lower grade	Permanent reduces salary and benefit costs. Low impact to morale.
Voluntary reduction of hours	Permanent reduces salary and benefit costs. Low impact to morale.

Timeline Targets

- All occupational groups/grades eligible

___% reduction. ___ employees.

Target Dates	Actions
Week of <i>April 24</i>	Brief Ed/Karen, then provide background info to SS/Deps (Donna V's email and some of her attachments, R7 data, our VV plan from 2014, etc.)
Week of <i>May 1</i> (3 rd or 4 th)	BOD meeting (Pat & Carla attend & walk through basic info/Q&A) to best path forward
Week of <i>May 8</i>	Representative VV Tiger Team to develop draft regional 2 page bus case with supporting attachments (PLMG provide background materials)
Week of <i>May 15</i>	Refine/finalize plan
Week of <i>May 22</i>	<i>Submit</i> R7 VV plan to HQ NLT May 24

R7 FY2014 DEMOGRAPHICS

- Total EPA R7 Workforce Targeted Positions/Job Series: 486
- 98 Employees eligible to retire in 2014
 - 38 employees accepted Retirement offer. (.08%)
- 128 Employees eligible for VERA in 2014
 - 10 employees accepted VERA offer. (.02%)
- 475 Employees eligible for VSIP in 2014 (offered 70)
 - 1 employee accepted VSIP offer. (.002%)

❖ April 2, 2014 data R7 Specific VV Data

R7 FY 2017 DEMOGRAPHICS

- Total EPA R7 Workforce: 509
 - 92 Employees eligible to retire in 2017 (18%)
 - 75 eligible to retire today. 17 more by 9/30/2017 *.
 - 99 Employees eligible for VERA in 2017 (19%)
 - 112 are eligible under VERA as of today. 4 more by 9/30/2017.
- ❖ April 13, 2017 data per HQ Data collection.
- ❖*Note: Total VERA eligible reduced by 17 retirement eligible by 9/30/17.

Retirement Eligible Division

Division	Retirement Eligible	VERA Eligible	VSIP
Office of the Regional Administrator	0	1	3
Office of Regional Counsel	8	11	42
Office of Tribal Affairs	1	0	3
Office of Public Affairs	4	4	16
Enforcement Coordination	1	2	12
Office of Policy and Management	12	14	67
Air and Waste Management Division	12	27	82
Environmental Services & Technology Division	16	12	68
Superfund Division	9	17	75
Water, Wetlands and Pesticides Division	12	24	76
Totals	75	112	444

Retirement Eligible Supervisory

Division	Retirement Eligible	VERA Eligible	VSIP
Office of the Regional Administrator	0	1	1
Office of Regional Counsel	0	2	6
Office of Tribal Affairs	1	0	1
Office of Public Affairs	0	1	2
Enforcement Coordination	0	1	2
Office of Policy and Management	1	4	8
Air and Waste Management Division	2	5	13
Environmental Services & Technology Division	2	4	8
Superfund Division	2	5	10
Water, Wetlands and Pesticides Division	5	3	11
Totals	13	26	62

Retirement Eligible Occupational Series/Competencies

Occupational Series	Retirement Eligible	VERA Eligible	VSIP
Architect (0808)	1	0	1
Supervisory Atty-Adviser/Atty- Adviser (0905)	8	10	37
Lead Budget Officer (0560)	0	1	2
Supervisory Chemist/Chemist (1320)	4	2	16
Supervisory Cntrct Spc/Lead Cntrct Spc (1102)	1	1	10
Deputy Division Director (0340)	2	7	12
Supervisory Envir Eng/Envir Eng (0819)	16	27	60
Supervisory Envir Pro Spc/Envir Pro Spc (0028)	6	14	44
Supervisory Envir Scient/Envir Scient (1301)	13	25	108
Financial Analyst (1160)	0	1	1
Sub Total	51	88	291

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Retirement Eligible Occupational Series/Competencies

Occupational Series	Retirement Eligible	VERA Eligible	V5IP
Admin & Office Support Student Trainee (0399)	0	0	1
Auditing (0511)	0	1	1
Community Planner (0020)	0	0	1
Ecology (0408)	0	1	3
General Engineering (0801)	0	1	1
Equal Employment Opportunity (0260) 0		0	1
Financial Administration and Program (0501)	0	0	2
Geology (1350)	0	0	2
Sub Total	0	3	12

Retirement Eligible Occupational Series/Competencies Cont.

Occupational Series	Retirement Eligible	VERA Eligible	VSIP
Financial Manager (0505)	0	1	1
Financial Technician (0503)	0	1	2
Government Information Spc (0306)	2	0	3
Superv Grants Mgt Spc/Grants Mgt Spc (1109)	3	0	6
Superv Human Res Spc/Hmn Res Spc (0201)	0	3	4
Lead Industrial Hygienist (0690)	1	0	2
Librarian (1410)	1	0	1
Information Technology Specialist (2210)	2	1	7
Supervisory Life Scientist/Life Scientist (0401)	3	1	30
Mgt & Pro Anlyst/Pro Anlyst (0343)	5	4	29
Sub Totals	17	11	85

Retirement Eligible Occupational Series/Competencies Cont.

Occupational Series	Retirement Eligible	VERA Eligible	VSIP
Paralegal Specialist (0950)	0	1	5
Public Affairs Specialist (1035)	2	2	10
Records & Info Mgt Spc (0308)	0	1	2
Secretary (0318)	1	2	15
Small Bus Util Spc (1101)	1	0	2
Special Assist/Info Mgt Spc (0301)	2	0	6
Lead Staff Accountant (0510)	0	1	5
Supply Technician (2005)	1	0	1
Support Services Spc (0342)	0	2	2
Visual Information Spc (1084)	0	1	2
Sub Totals	7	10	50

16

Retirement Eligible Occupational Series/Competencies Cont.

Occupational Series	Retirement Eligible	VERA Eligible	VSIP
Nuclear Engineering (0840)	0	0	2
Office Automation Clerical & Assistance (0326)	0	0	1
Security Administration (0080)	0	0	1
General Supply (2001)	0	0	1
Toxicology (0415)	0	0	1
Sub Totals	0	0	6
Grand Total	75	112	444

VERA/VSIP Budget Impacts

- Estimated cost of VSIP for 50 employees: * \$1.3M
- Estimated cost of leave payouts: ** \$.5M
- Estimated future year reduction: *** \$5.4M
- Reduction in other operating costs: ****\$.2M

*Estimate of 50 for illustration only. \$25,000/employee

**Average Leave for R7 (subtracting low and high before averaging)

***Based on GS 12 step 8 with 32% benefits

****Based on WCF costs of \$3,600/employee used in FY 14 package

18

Next Steps

- Continue incorporating feedback and refining justifications
- Present to Senior leadership
- Coordinate efforts with HQ
- Build a communication plan
- Update requests to conform with new OPM standards (pending issuance)
- Negotiate with Union
- Schedule retirement training and education opportunities for R7 employees

Message

From: Price, Patricia [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=51C2C9444160467DAFC12D77F98E994B-PRICE, PATR]
Sent: 5/9/2017 10:42:13 PM
To: Dunbar, Danielle [dunbar.danielle@epa.gov]
Subject: File for Additions
Attachments: VERA_VSIP_Region7_5_9_2017_Final 828pm version.pptx

Pat Price
Human Resources Officer
EPA – Region 7
Office of Policy & Management
Human Capital Management Branch
11201 Renner Blvd
Lenexa, KS 66219
913 551-7575
Price.patricia@epa.gov

R7 RA/DRA Briefing

VERA/VSIP – May 11, 2017



DEFINITIONS

- **Voluntary Early Retirement Authority (VERA)**

- Allows agencies to temporarily lower the age and service requirements for retirement eligibility. VERA encourages more voluntary separations and helps the agency complete the needed organizational changes with minimal disruption to the work force. By offering these short term opportunities, an agency can make it possible for employees to receive an immediate annuity years before they would otherwise be eligible.

- **Voluntary Separation Incentive Payments (VSIP)**

- Also known as buyout authority, allows agencies that are downsizing or restructuring to offer employees lump-sum payments up to \$25,000 as an incentive to voluntarily separate. The employee must volunteer to separate by resignation, optional retirement, or by voluntary early retirement. By allowing employees to volunteer to leave the Government, agencies can minimize or avoid involuntary separations through the use of costly and disruptive reductions in force (RIFs).

Why VERA/VSIP?

- Prepares Region to meet the requirements of Exec. Order A Comprehensive Plan for Reorganizing the Executive Branch.
- Provides flexibility to Region 7 to restructure workforce to align with Agency Mission and current priorities.
- R7's plan has three primary goals: (1) better balance in our grade levels; (2) better supervisor-to-staff ratio; and (3) to reshape our work & workforce to meet current and future challenges with new skill sets and new approaches to our work
- Can help to avoid more disruptive workforce planning tools.
- VERA/VSIP in 2014 allowed Region to bring in new entry level employees in scientific series with new skill sets, earlier in career who can more easily be cross trained and reassigned throughout the organization to support new priorities.

VERA/VSIP Justification

- Agency focus on core legal requirements will likely eliminate functions.
- Executive Orders will likely reduce federal oversight of select programs.
- Agency priorities and program funding will shift. Reducing the number of higher-graded and administrative employees will allow flexibility to restructure workforce to align with Agency priorities.
- Current rate of retirements without incentives will not permit the Region to meet the changing Agency focus.

Alternatives to VERA/VSIP

Action	Discussion
Detail employees to other Agencies	Temporarily reduces salary and benefit costs. Unlikely given government wide changes. Low impact to morale.
Directed reassignments	No reduction in salary and benefit costs. Management can permanently move employees to different functions.
Freeze hiring and promotion actions	Temporarily reduces salary and benefit costs. Is difficult in highly technical fields. Potential high impact to morale.
Furlough	Temporarily reduces salary and benefit costs. High impact to morale.
Modify or waive qualifications	No reduction in salary and benefit costs. Is difficulty in highly technical fields. Potential high impact to morale.
Separate Temp. Employees/Reemployed Annuitants	Very few employees in Region in these categories. Permanent reduces salary and benefit costs. High impact to morale.
Train employees for other positions.	No reduction in salary and benefits costs. Increased cost for training. Is difficult in highly and time consuming in technical fields. Low impact to morale.
Voluntary change to lower grade	Permanent reduces salary and benefit costs. Low impact to morale.
Voluntary reduction of hours	Permanent reduces salary and benefit costs. Low impact to morale.

R7 DEMOGRAPHICS

- *Total EPA R7 Workforce: 506
 - *92 Employees eligible to retire in 2017 (16 %)
 - *77 eligible to retire today.
 - An additional *15 are eligible by 09 / 30 /2017.
 - *83 Employees eligible for VERA in 2017 (17 %)
 - *83 are eligible under VERA as of today.
 - An additional ? are eligible by 09 / 30 /2017.
- ❖ April 21, 2017 data , * Pending HQ Data comparison

Targets

- All occupational groups/grades eligible
 ____% reduction. ____ employees.

Target Dates	Actions
Week of April 24	Brief Ed/Karen, then provide background info to SS/Deps (Donna V's email and some of her attachments, R7 data, our VV plan from 2014, etc.)
Week of May 1 (3 rd or 4 th)	BOD meeting (Pat & Carla attend & walk through basic info/Q&A) to best path forward
Week of May 8	Representative VV Tiger Team to develop draft regional 2 page bus case with supporting attachments (PLMG provide background materials)
Week of May 15	Refine/finalize plan
Week of May 22	Submit R7 VV plan to HQ NLT May 24

Retirement Eligible Division

Division	Retirement Eligible	VERA Eligible	VSIP	Total
Office of the Regional Administrator	0	1	3	
Office of Regional Counsel	8	11	42	
Office of Tribal Affairs	1	0	3	
Office of Public Affairs	4	4	16	
Enforcement Coordination	1	2	12	
Office of Policy and Management	12	14	67	
Air and Waste Management Division	12	27	82	
Environmental Services & Technology Division	16	12	68	
Superfund Division	9	17	75	
Water, Wetlands and Pesticides Division	12	24	76	
Totals	75	112	444	

Retirement Eligible Supervisory

Division	Retirement Eligible	VERA Eligible	VSIP	Total
Office of the Regional Administrator	0	1	1	
Office of Regional Counsel	0	2	6	
Office of Tribal Affairs	1	0	1	
Office of Public Affairs	0	1	2	
Enforcement Coordination	0	1	2	
Office of Policy and Management	1	4	8	
Air and Waste Management Division	2	5	13	
Environmental Services & Technology Division	2	4	8	
Superfund Division	2	5	10	
Water, Wetlands and Pesticides Division	5	3	11	
Totals	13	26	62	

Retirement Eligible Occupational Series/Competencies

Occupational Series	Retirement Eligible	VERA Eligible	VSIP	Total
Architect (0808)	1	0	1	
Supervisory Atty-Adviser/Atty- Adviser (0905)	8	10	37	
Lead Budget Officer (0560)	0	1	2	
Supervisory Chemist/Chemist (1320)	4	2	16	
Supervisory Cntrct Spc/Lead Cntrct Spc (1102)	1	1	10	
Deputy Division Director (0340)	2	7	12	
Supervisory Envir Eng/Envir Eng (0819)	16	27	60	
Supervisory Envir Pro Spc/Envir Pro Spc (0028)	6	14	44	
Supervisory Envir Scient/Envir Scient (1301)	13	25	108	
Financial Analyst (1160)	0	1	1	
Total				

Retirement Eligible Occupational Series/Competencies

Occupational Series	Retirement Eligible	VERA Eligible	V5IP	Total
Admin & Office Support Student Trainee (0399)	0	0	1	
Auditing (0511)	0	1	1	
Community Planner (0020)	0	0	1	
Ecology (0408)	0	1	3	
General Engineering (0801)	0	1	1	
Equal Employment Opportunity (0260)	0	0	1	
Financial Administration and Program (0501)	0	0	2	
Geology (1350)	0	0	2	

Retirement Eligible Occupational Series/Competencies Cont.

Occupational Series	Retirement Eligible	VERA Eligible	VSIP	Total
Financial Manager (0505)	0	1	1	
Financial Technician (0503)	0	1	2	
Government Information Spc (0306)	2	0	3	
Superv Grants Mgt Spc/Grants Mgt Spc (1109)	3	0	6	
Superv Human Res Spc/Hmn Res Spc (0201)	0	3	4	
Lead Industrial Hygienist (0690)	1	0	2	
Librarian (1410)	1	0	1	
Information Technology Specialist (2210)	2	1	7	
Supervisory Life Scientist/Life Scientist (0401)	3	1	30	
Mgt & Pro Anlyst/Pro Anlyst (0343)	5	4	29	
Totals				

Retirement Eligible Occupational Series/Competencies Cont.

Occupational Series	Retirement Eligible	VERA Eligible	VSIP	Total
Paralegal Specialist (0950)	0	1	5	
Public Affairs Specialist (1035)	2	2	10	
Records & Info Mgt Spc (0308)	0	1	2	
Secretary (0318)	1	2	15	
Small Bus Util Spc (1101)	1	0	2	
Special Assist/Info Mgt Spc (0301)	2	0	6	
Lead Staff Accountant (0510)	0	1	5	
Supply Technician (2005)	1	0	1	
Support Services Spc (0342)	0	2	2	
Visual Information Spc (1084)	0	1	2	
Totals				

Retirement Eligible Occupational Series/Competencies Cont.

Occupational Series	Retirement Eligible	VERA Eligible	VSIP	Total
Nuclear Engineering (0840)	0	0	2	
Office Automation Clerical & Assistance (0326)	0	0	1	
Security Administration (0080)	0	0	1	
General Supply (2001)	0	0	1	
Toxicology (0415)	0	0	1	
Totals				

VERA/VSIP Budget Impacts

- Estimated cost of VSIP for 50 employees: * \$1.3M
- Estimated cost of leave payouts: ** \$.5M
- Estimated future year reduction: *** \$5.4M
- Reduction in other operating costs: ****\$.2M

*Estimate of 50 for illustration only. \$25,000/employee

**Average Leave for R7 (subtracting low and high before averaging)

***Based on GS 12 step 8 with 32% benefits

****Based on WCF costs of \$3,600/employee used in FY 14 package

Next Steps

- Continue incorporating feedback and refining justifications
- Present to Senior leadership
- Coordinate efforts with HQ
- Build a communication plan
- Update requests to conform with new OPM standards (pending issuance)
- Negotiate with Union
- Schedule retirement training and education opportunities for R7 employees

Message

From: Price, Patricia [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=51C2C9444160467DAFC12D77F98E994B-PRICE, PATR]
Sent: 4/24/2017 11:44:22 PM
To: Kohler, Carla [Kohler.Carla@epa.gov]
Subject: FW: Updated Slide
Attachments: VERA_VSIP_Region7_4_24_2017_Final.pptx

Carla,

Danielle will be updating this slide with new numbers from her and Wendy's HQ/Regional budget comparison. I updated the other slides with the blank targets and slide for the additional justifications.

Pat Price
Human Resources Officer
EPA – Region 7
Office of Policy & Management
Human Capital Management Branch
11201 Renner Blvd
Lenexa, KS 66219
913 551-7575
Price.patricia@epa.gov

From: Price, Patricia
Sent: Monday, April 24, 2017 6:34 PM
To: Dunbar, Danielle <dunbar.danielle@epa.gov>
Subject: Updated Slide

Danielle,

Most updated version.

Pat Price
Human Resources Officer
EPA – Region 7
Office of Policy & Management
Human Capital Management Branch
11201 Renner Blvd
Lenexa, KS 66219
913 551-7575
Price.patricia@epa.gov

R7 RA/DRA Briefing

VERA/VSIP – Week of April 24, 2017



DEFINITIONS

- **Voluntary Early Retirement Authority (VERA)**

- Allows agencies to temporarily lower the age and service requirements for retirement eligibility. VERA encourages more voluntary separations and helps the agency complete the needed organizational changes with minimal disruption to the work force. By offering these short term opportunities, an agency can make it possible for employees to receive an immediate annuity years before they would otherwise be eligible.

- **Voluntary Separation Incentive Payments (VSIP)**

- Also known as buyout authority, allows agencies that are downsizing or restructuring to offer employees lump-sum payments up to \$25,000 as an incentive to voluntarily separate. The employee must volunteer to separate by resignation, optional retirement, or by voluntary early retirement. By allowing employees to volunteer to leave the Government, agencies can minimize or avoid involuntary separations through the use of costly and disruptive reductions in force (RIFs).

Why VERA/VSIP?

- Prepares Region to meet the requirements of Exec. Order A Comprehensive Plan for Reorganizing the Executive Branch.
- Provides flexibility to Region 7 to restructure workforce to align with Agency Mission and current priorities.
- R7's plan has three primary goals: (1) better balance in our grade levels; (2) better supervisor-to-staff ratio; and (3) to reshape our work & workforce to meet current and future challenges with new skill sets and new approaches to our work
- Can help to avoid more disruptive workforce planning tools.
- VERA/VSIP in 2014 allowed Region to bring in new entry level employees in scientific series with new skill sets, earlier in career who can more easily be cross trained and reassigned throughout the organization to support new priorities.

VERA/VSIP Justification

- Agency focus on core legal requirements will likely eliminate functions.
- Executive Orders will likely reduce federal oversight of select programs.
- Agency priorities and program funding will shift. Reducing the number of higher-graded and administrative employees will allow flexibility to restructure workforce to align with Agency priorities.
- Current rate of retirements without incentives will not permit the Region to meet the changing Agency focus.

Alternatives to VERA/VSIP

Action	Discussion
Detail employees to other Agencies	Temporarily reduces salary and benefit costs. Unlikely given government wide changes. Low impact to morale.
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Freeze hiring and promotion actions	Temporarily reduces salary and benefit costs. Is difficult in highly technical fields. Potential high impact to morale.
Furlough	Temporarily reduces salary and benefit costs. High impact to morale.
Modify or waive qualifications	No reduction in salary and benefit costs. Is difficulty in highly technical fields. Potential high impact to morale.
Separate Temp. Employees/Reemployed Annuitants	Very few employees in Region in these categories. Permanent reduces salary and benefit costs. High impact to morale.
Train employees for other positions.	No reduction in salary and benefits costs. Increased cost for training. Is difficult in highly and time consuming in technical fields. Low impact to morale.
Voluntary change to lower grade	Permanent reduces salary and benefit costs. Low impact to morale.
Voluntary reduction of hours	Permanent reduces salary and benefit costs. Low impact to morale.

R7 DEMOGRAPHICS

- *Total EPA R7 Workforce: 506
 - *73 Employees eligible to retire in 2017 (15 %)
 - *58 eligible to retire today.
 - An additional *17 are eligible by 09 / 30 /2017.
 - *151 Employees eligible for VERA in 2017 (30 %)
 - *151 are eligible under VERA as of today.
 - An additional ? are eligible by 09 / 30 /2017.
- ❖ April 21, 2017 data , * Pending HQ Data comparison

Targets

- All occupational groups/grades eligible
___% reduction. ___ employees.

Target Dates	Actions
Week of April 24	Brief Ed/Karen, then provide background info to SS/Deps (Donna V's email and some of her attachments, R7 data, our VV plan from 2014, etc.)
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Week of May 15	Refine/finalize plan
Week of May 22	Submit R7 VV plan to HQ NLT May 24

Retirement Eligible Division

Division	Retirement Eligible	VERA Eligible	All Other	Total
Office of the Regional Administrator	0	0		
Office of Regional Counsel	9	16		
Office of Tribal Affairs	1	1		
Office of Public Affairs	3	7		
Enforcement Coordination	1	3		
Office of Policy and Management	12	23		
Air and Waste Management Division	12	30		
Environmental Services & Technology Division	13	21		
Superfund Division	9	24		
Water, Wetlands and Pesticides Division	13	26		

Retirement Eligible Supervisory

Division	Retirement Eligible	VERA Eligible	All Other	Total
Office of the Regional Administrator	0	0		
Office of Regional Counsel	0	2		
Office of Tribal Affairs	1	1		
Office of Public Affairs	0	1		
Enforcement Coordination	0	1		
Office of Policy and Management	2	4		
Air and Waste Management Division	2	5		
Environmental Services & Technology Division	1	3		
Superfund Division	3	6		
Water, Wetlands and Pesticides Division	5	7		

Retirement Eligible Occupational Series/Competencies

Occupational Series	Retirement Eligible	VERA Eligible	All Other	Total
Architect (0808)	1	1		
Supervisory Atty-Adviser/Atty- Adviser (0905)	9	15		
Lead Budget Officer (0510)	0	1		
Supervisory Chemist/Chemist (1320)	2	4		
Supervisory Cntrct Spc/Lead Cntrct Spc (1102)	1	2		
Deputy Division Director (0340)	1	4		
Supervisory Envir Eng/Envir Eng (0819)	17	40		
Supervisory Envir Pro Spc/Envir Pro Spc (0028)	9	18		
Supervisory Envir Scient/Envir Scient (1301)	11	26		
Financial Analyst (1160)	0	1		

Retirement Eligible Occupational Series/Competencies Cont.

Occupational Series	Retirement Eligible	VERA Eligible	All Other	Total
Financial Manager (0505)	1	1		
Financial Technician (0503)	0	1		
Government Information Spc (0306)	2	2		
Superv Grants Mgt Spc/Grants Mgt Spc (1109)	3	3		
Superv Human Res Spc/Hmn Res Spc (0201)	0	3		
Info Tech Spc (2210)	2	2		
Superv Life Scienc/Life Scienc (0401)	3	3		
Mgt & Pro Anlyst/Pro Anlst (0343)	6	9		
Paralegal Spc (0950)	0	1		
Public Affairs Spc (1035)	1	3		
Totals	18	28		

Retirement Eligible Occupational Series/Competencies Cont.

Occupational Series	Retirement Eligible	VERA Eligible	All Other	Total
Records & Info Mgt Spc (0308)	0	1		
Secretary (0318)	0	2		
Small Bus Util Spc (1101)	1	1		
Special Assist/Info Mgt Spc (0301)	2	2		
Lead Staff Accountant (0510)	0	1		
Supply Technician (2005)	1	1		
Support Services Spc (0342)	0	2		
Visual Information Spc (1084)	0	1		
Totals	4	11		

VERA/VSIP Budget Impacts

- Estimated cost of VSIP for ____ employees:
- Estimated cost of leave payouts:
- Estimated future year reduction:
- Reduction in other operating costs:

Next Steps

- Continue incorporating feedback and refining justifications
- Present to Senior leadership
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Message

From: Price, Patricia [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=51C2C9444160467DAFC12D77F98E994B-PRICE, PATR]
Sent: 4/21/2017 10:52:27 PM
To: Krehbiel, Ben [Krehbiel.Ben@epa.gov]; Kohler, Carla [Kohler.Carla@epa.gov]
Subject: Draft VERA/VSIP Powerpoint
Attachments: VERA_VISP_Region7_4_21_2017_Final.pptx

Carla,

I have put a draft of the Powerpoint where we have included numbers in the attached. I am going to confirmed the numbers on slide 6 on Monday with Danielle.

Ben,

I attempted to save in the PLMG/IO Folder however, I received message that I did not have rights to save the folder.

Pat Price
Human Resources Officer
EPA – Region 7
Office of Policy & Management
Human Capital Management Branch
11201 Renner Blvd
Lenexa, KS 66219
913 551-7575
Price.patricia@epa.gov

R7 RA Briefing

VERA/VSIP – April 24, 2017



DEFINITIONS

- **Voluntary Early Retirement Authority (VERA)**

- Allows agencies to temporarily lower the age and service requirements for retirement eligibility. VERA encourages more voluntary separations and helps the agency complete the needed organizational changes with minimal disruption to the work force. By offering these short term opportunities, an agency can make it possible for employees to receive an immediate annuity years before they would otherwise be eligible.

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- Provides flexibility to Region 7 to restructure workforce to align with Agency Mission and current priorities.
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Alternatives to VERA/VSIP

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Voluntary reduction of hours	Permanent reduces salary and benefit costs. Low impact to morale.

R7 DEMOGRAPHICS

- Total EPA R7 Workforce: 503
 - 51 Employees eligible to retire in 2017
 - ___ eligible to retire today. (Confirming)
 - 112 Employees eligible for VERA in 2017
 - _____ are eligible under VERA as of today. (Confirming)
- ❖ April 21, 2017 data

Retirement Eligible Division

Division	Retirement Eligible	VERA Eligible	All Other	Total
Office of the Regional Administrator	0	0		
Office of Regional Counsel	9	16		
Office of Tribal Affairs	1	1		
Office of Public Affairs	3	7		
Enforcement Coordination	1	3		
Office of Policy and Management	12	23		
Air and Waste Management Division	12	30		
Environmental Services & Technology Division	13	21		
Superfund Division	9	24		
Water, Wetlands and Pesticides Division	13	26		

Retirement Eligible Supervisory

Division	Retirement Eligible	VERA Eligible	All Other	Total
Office of the Regional Administrator	0	0		
Office of Regional Counsel	0	2		
Office of Tribal Affairs	1	1		
Office of Public Affairs	0	1		
Enforcement Coordination	0	1		
Office of Policy and Management	2	4		
Air and Waste Management Division	2	5		
Environmental Services & Technology Division	1	3		
Superfund Division	3	6		
Water, Wetlands and Pesticides Division	5	7		

Retirement Eligible Occupational Series/Competencies

Occupational Series	Retirement Eligible	VERA Eligible	All Other	Total
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Supervisory Atty-Adviser/Atty- Adviser (0905)	9	15		
Lead Budget Officer (0510)	0	1		
Supervisory Chemist/Chemist (1320)	2	4		
Supervisory Cntrct Spc/Lead Cntrct Spc (1102)	1	2		
Deputy Division Director (0340)	1	4		
Supervisory Envir Eng/Envir Eng (0819)	17	40		
Supervisory Envir Pro Spc/Envir Pro Spc (0028)	9	18		
Supervisory Envir Scient/Envir Scient (1301)	11	26		
Financial Analyst (1160)	0	1		

Retirement Eligible Occupational Series/Competencies Cont.

Occupational Series	Retirement Eligible	VERA Eligible	All Other	Total
Financial Manager (0505)	1	1		
Financial Technician (0503)	0	1		
Government Information Spc (0306)	2	2		
Superv Grants Mgt Spc/Grants Mgt Spc (1109)	3	3		
Superv Human Res Spc/Hmn Res Spc (0201)	0	3		
Info Tech Spc (2210)	2	2		
Superv Life Scienc/Life Scienc (0401)	3	3		
Mgt & Pro Anlyst/Pro Anlst (0343)	6	9		
Paralegal Spc (0950)	0	1		
Public Affairs Spc (1035)	1	3		
Totals	18	28		

Retirement Eligible Occupational Series/Competencies Cont.

Occupational Series	Retirement Eligible	VERA Eligible	All Other	Total
Records & Info Mgt Spc (0308)	0	1		
Secretary (0318)	0	2		
Small Bus Util Spc (1101)	1	1		
Special Assist/Info Mgt Spc (0301)	2	2		
Lead Staff Accountant (0510)	0	1		
Supply Technician (2005)	1	1		
Support Services Spc (0342)	0	2		
Visual Information Spc (1084)	0	1		
Totals	4	11		

VERA/VSIP Budget Impacts

- Estimated cost of VSIP for ____ employees:
- Estimated cost of leave payouts:
- Estimated future year reduction:
- Reduction in other operating costs:

Region 7 Timeline

- Week of **April 24** – Brief Ed/Karen, then provide background info to SS/Deps (Donna V's email and some of her attachments, R7 data, our VV plan from 2014, etc.)
- Week of **May 1** (3rd or 4th) – BOD meeting (Pat & Carla attend & walk through basic info/Q&A) to best path forward
- Week of **May 8** – Representative VV Tiger Team to develop draft regional 2 page bus case with supporting attachments (PLMG provide background materials)
- Week of **May 15** – Refine/finalize plan
- Week of **May 22** – *Submit* R7 VV plan to HQ NLT May 24

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Message

From: Cooper, Marian [Cooper.Marian@epa.gov]
Sent: 10/23/2017 12:24:34 PM
To: Showman, John [Showman.John@epa.gov]
Subject: HR SSC Business Case1.final10.20.17.docx
Attachments: HR SSC Business Case1.final10.20.17.docx

Your thoughts on Debbi's comment are welcome.

Message

From: Monroe, Scott [Monroe.Scott@epa.gov]
Sent: 6/21/2017 9:43:03 PM
To: Christian, Pamela [Christian.Pamela@epa.gov]; Bradish, Tracey [bradish.tracey@epa.gov]; Bullard, Pamela [Bullard.Pamela@epa.gov]; Logan, Kia [Logan.Kia@epa.gov]; Whitlow, Jeff [Whitlow.Jeff@epa.gov]
CC: Kutzke, Julie [Kutzke.Julie@epa.gov]; Monroe, Scott [Monroe.Scott@epa.gov]
Subject: Sensitive - management only -- do not share
Attachments: OD Talk Pts and Q&A on prelim annmnt.docx

Importance: High

To OAR Planning Officers and Pam C.:

As I communicated earlier today, Sarah will speak only in general terms about OAR's buyout proposal at the all-hands meetings. On the matter of who is/isn't eligible, Sarah will give your name to your respective offices as the POC for employees to ask if they are eligible. Lucky you!

Attached please find a document that is intended to assist you with talking to individual employees. It is not recommended that you share information beyond what's in this document, whether in individual or group settings, because of our obligation to invite unions (with at least 24 hours' notice) to any meeting that could be construed as a "formal meeting."

Some employees will miss the all-hands meetings this week. The document includes some of Sarah's talking points for your own reference in talking later with absentees. (By the way, there's no reason why someone with a conflict can't attend another office's meeting with Sarah, because the content will be the same. We won't be getting into office-level information at the all-hands.)

Also, the document includes a Q&A script. You are free to use your own style but please do not elaborate beyond this content. Because the EPA proposal isn't approved yet, we must be careful to use tentative language and limited details. Normally we wouldn't be sharing info at this stage, but EPA leaders were concerned about the short time frame to apply and wanted to give employees as much of a signal as possible.

Call me if you have questions.

Scott Monroe
Director of Human Resources
Office of Air and Radiation
Mail Code 6101A
Clinton North Room 5435A
tel: 202-564-1271
fax: 202-501-0600

Message

From: Alpert, Adina [Alpert.Adina@epa.gov]
Sent: 5/22/2017 8:04:15 PM
To: Monroe, Scott [Monroe.Scott@epa.gov]
CC: Kutzke, Julie [Kutzke.Julie@epa.gov]; Hyde, Courtney [Hyde.Courtney@epa.gov]
Subject: RE: Heads-up re: buyout
Attachments: V-V Business Case Checklist April2017_AA.docx

Here you go. Let me know if you want me to make any adjustments!

Adina

From: Monroe, Scott
Sent: Monday, May 22, 2017 3:18 PM
To: Alpert, Adina <Alpert.Adina@epa.gov>
Cc: Kutzke, Julie <Kutzke.Julie@epa.gov>; Hyde, Courtney <Hyde.Courtney@epa.gov>
Subject: RE: Heads-up re: buyout

Yes, I think this is OK, thanks. It will help to see the assumptions.

From: Alpert, Adina
Sent: Monday, May 22, 2017 1:30 PM
To: Monroe, Scott <Monroe.Scott@epa.gov>
Cc: Kutzke, Julie <Kutzke.Julie@epa.gov>; Hyde, Courtney <Hyde.Courtney@epa.gov>
Subject: RE: Heads-up re: buyout

This is what I'm estimating. What do you think?

If it looks alright to you, I'll add in my assumptions and send the document back over.

Thanks,
Adina

Table A – Direct Costs for VERA/VSIP

# of Targeted Positions for VSIP x \$25,000	Ex. 5 - Deliberative Process
Annual Leave Pay Out for # of Targeted Positions for VERA, Optional Retirement or Resignation {Hourly rate based on the average grade and step of the targeted pool x 240 x # of Targeted Positions}	
Total Maximum Direct Costs	

Table B – Estimated Savings for FY 2018 through FY 2019

	FY 2018 Estimate	FY 2019 Estimate
A. Pre-VERA/VSIP Annual Payroll Cost	Ex. 5 - Deliberative Process	
B. VERA/ VSIP Payout Cost		
C. Leave Payout Cost		
D. Post VERA/VSIP Annual Payroll Cost		
E. Payroll for # New Hires		

F. Payroll Savings for # VERA/VSIP Targeted Positions (F = A – B – C – D - E)
G. Pre-VERA/VSIP Annual WCF Cost
H. Post VERA/VSIP Annual WCF Cost
I. WCF for # New Hires
J. WCF Savings for # VERA/VSIP Targeted Positions (J = G – H – I)
Projected Savings with VERA/VSIP (F + J)

Ex. 5 - Deliberative Process

From: Monroe, Scott

Sent: Monday, May 22, 2017 11:00 AM

To: Alpert, Adina <Alpert.Adina@epa.gov>

Cc: Kutzke, Julie <Kutzke.Julie@epa.gov>; Hyde, Courtney <Hyde.Courtney@epa.gov>

Subject: Re: Heads-up re: buyout

Hi,

Assume we hire back 5 positions (25%).

Err on the high end.

Yes, zero. I have idea what that item is for!

Sent from my iPhone

On May 22, 2017, at 10:23 AM, Alpert, Adina <Alpert.Adina@epa.gov> wrote:

Hi Julie,

I have a few clarifying questions:

- How many new hires should I calculate? I would assume any of them would be lower graded.
- Would you prefer a lump sum payout estimate that's higher or more realistic to the number of hours of the OAR positions targeted?
- There's a line for "Post VERA/VSIP Annual Payroll Cost" for the VV employees. Logic leads me to conclude that's \$0, but I just wanted to be sure I wasn't misunderstanding.

Based on your suggestion, I will do a run that looks at OTAQ differently and see how much the numbers change.

Thanks,

Adina

From: Kutzke, Julie

Sent: Monday, May 22, 2017 9:52 AM

To: Alpert, Adina <Alpert.Adina@epa.gov>

Cc: Monroe, Scott <Monroe.Scott@epa.gov>; Hyde, Courtney <Hyde.Courtney@epa.gov>

Subject: RE: Heads-up re: buyout

The 20.... Since that's the max number of buyouts.

The 67 is the pool of eligibles.. Last time, I'm thinking you must have averaged the data on their salary and annual leave to develop the estimates.

From: Alpert, Adina
Sent: Monday, May 22, 2017 9:49 AM
To: Kutzke, Julie <Kutzke.Julie@epa.gov>
Cc: Monroe, Scott <Monroe.Scott@epa.gov>; Hyde, Courtney <Hyde.Courtney@epa.gov>
Subject: RE: Heads-up re: buyout

Gotcha! Am I using the 67 number or the 20?

Adina

OAA
OAP
OAQPS
OTAQ
ORIA

Eligible

Offers

Ex. 5 - Deliberative Process

From: Kutzke, Julie
Sent: Monday, May 22, 2017 8:39 AM
To: Alpert, Adina <Alpert.Adina@epa.gov>
Cc: Monroe, Scott <Monroe.Scott@epa.gov>; Hyde, Courtney <Hyde.Courtney@epa.gov>
Subject: RE: Heads-up re: buyout

The budget estimates on Page 2 of this document

From: Alpert, Adina
Sent: Monday, May 22, 2017 8:34 AM
To: Kutzke, Julie <Kutzke.Julie@epa.gov>
Cc: Monroe, Scott <Monroe.Scott@epa.gov>; Hyde, Courtney <Hyde.Courtney@epa.gov>
Subject: RE: Heads-up re: buyout

Forgive my addled brain, but remind me what you need? I am teleworking today before heading down to RTP.

Thanks,
Adina

From: Kutzke, Julie
Sent: Thursday, May 18, 2017 4:54 PM
To: Alpert, Adina <Alpert.Adina@epa.gov>
Cc: Monroe, Scott <Monroe.Scott@epa.gov>; Hyde, Courtney <Hyde.Courtney@epa.gov>
Subject: FW: Heads-up re: buyout

This may help you figure out what we will presumably still need to submit next week re: the budget estimation information.

From: Alpert, Adina
Sent: Monday, May 15, 2017 8:40 AM

To: Monroe, Scott <Monroe.Scott@epa.gov>

Cc: Hyde, Courtney <Hyde.Courtney@epa.gov>; Kutzke, Julie <Kutzke.Julie@epa.gov>

Subject: RE: Heads-up re: buyout

Thanks for the info. If the offices are able to provide the divisions, I could figure out the EPM/S&T splits. I read "location" below as the physical location, but if it means division or even branch, then we're all set.

And this is yet another example of OCFO and OARM not really understanding the many facets of payroll management. Can you even imagine how this exercise will go under PCA?

Adina

From: Monroe, Scott

Sent: Friday, May 12, 2017 4:47 PM

To: Alpert, Adina <Alpert.Adina@epa.gov>

Cc: Hyde, Courtney <Hyde.Courtney@epa.gov>; Kutzke, Julie <Kutzke.Julie@epa.gov>

Subject: Heads-up re: buyout

Hi Adina,

Julie and I will need your help next week to fill out the attached spreadsheet. OARM just threw us a bit of curveball (Friday special!) by asking for the spreadsheet by 5/19 AND by adding a wrinkle where they want us to identify eligible positions according to S&T vs. EPM. Also, by 5/24 we've been asked to provide a narrative (see Word file) that contains the direct costs PLUS estimated costs across FY18 and FY19. At the moment I'm more concerned with the spreadsheet.

I've asked the Planning Officers to send me their numbers by Wednesday. They will tell me which positions (series, grade, location) they are treating as eligible. What information do you need in order to discern the related appropriation – i.e., do you need to know the employee name? Or should I just ask the Planning Officers to tell me whether the target position is charged to S&T or EPM? (And do we have positions charged to multiple appropriations, as indicated in the spreadsheet?) Please advise.

Thanks,
Scott

Message

From: Kutzke, Julie [Kutzke.Julie@epa.gov]
Sent: 5/19/2017 9:29:27 PM
To: Monroe, Scott [Monroe.Scott@epa.gov]
Subject: FW: Workforce Reshaping follow up
Attachments: OAR Targeted Positions Template from OHR).xlsx; OAR V-V Business Case Checklist May 19.docx

We'll need to look at the spreadsheet here... the last couple of columns ask for number of offers per series (which we can easily use the same approach that we don't care which series..) but it also asks for number of restructured & eliminated positions... which our answer will be "it depends on who leaves"

From: Hart, Debbi
Sent: Friday, May 19, 2017 12:39 PM
To: ARA <ARA@epa.gov>
Cc: RHRO <RHRO@epa.gov>; OHR PMOs <OHR_PMOs@epa.gov>; Parker, Gary <parker.gary@epa.gov>; Hunt, Loretta <Hunt.Loretta@epa.gov>; Carpenter, Wesley <Carpenter.Wesley@epa.gov>; Gray, Linda <gray.linda@epa.gov>; Showman, John <Showman.John@epa.gov>; Vizian, Donna <Vizian.Donna@epa.gov>; Westenberger, Andrea <Westenberger.Andrea@epa.gov>
Subject: FW: Workforce Reshaping follow up

Greetings All-

First off-- thanks for your support in this effort. We are at eight submissions thus far and the day is young! A number of folks are checking in on whether or not we are holding with the May 24th deadline for submission of full business case/targeted positions template/organization charts. The answer is yes with the qualifier that we still do not have the green light to proceed. I know many of you are pretty close if not finished with your submission for next week and the truth is that we need to be ready to move quickly if we do get approval to move forward.

One additional piece of information related to safe positions. **If your organization plans to use safe positions, your safe positions must be discussed in your business case and identified in your targeted positions template with an asterisk (*).** Please remember, this option assumes the employees who remain would meet the qualifications for the safe positions. Positions identified as safe positions do not have to be restructured if vacated.

Thank you again for your efforts. As always, please let me know if you have questions. Debbi

Debbi Hart
Director
Policy, Planning & Training Division
OHR, OARM
USEPA
202.564.2011
hart.debbi@epa.gov

From: Vizian, Donna
Sent: Friday, May 12, 2017 3:57 PM
To: 2017HQfirstassistants <2017HQfirstassistants@epa.gov>; 2017Regionfirstassistants <2017Regionfirstassistants@epa.gov>
Cc: Hart, Debbi <Hart.Debbi@epa.gov>; Parker, Gary <parker.gary@epa.gov>; Hunt, Loretta <Hunt.Loretta@epa.gov>;

Gray, Linda <gray.linda@epa.gov>; Carpenter, Wesley <Carpenter.Wesley@epa.gov>; DAA-Career <DAACareer@epa.gov>; DRA <DRA@epa.gov>; ARA <ARA@epa.gov>

Subject: Workforce Reshaping follow up

Hi Everyone,

Following up on our Wednesday conversation, we reviewed the themes and combined the restructuring of non-supervisory positions and restructuring of supervisory positions into one theme. I am attaching the table of the revised themes. There are now 6. Our next step is to estimate the number of positions in the pool and number of offers we would accept by theme and appropriation. If you have a position that crosses multiple appropriations, please indicate as such by using the "Across Multiple Appropriations" column along with specific details in the "Comments" column. Please remember that this is an **estimate** to be used to show the potential outcome to the policy team. If the decision is to proceed, we will ask you to provide detailed information that will lead to your final number. Please complete the attached spreadsheet **by May 19th** and send it to Debbi Hart and me. Remember, you do not need to participate in every theme.

If we move to the implementation stage, the next step will be to complete a template for your office and identify positions in the pool. We will resend that information and Debbi will be available to assist your staff with completing the information. OARM would then use this information to develop one business case for the agency. We will also begin working on a communication plan should we get the green light to proceed.

Two other things: I am attaching FAQs for your information and below is information on "safe positions."

OPM's revised VSIP template addresses safe positions (attached, pg. 2, first paragraph):

The agency's targeted population chart, "... may include additional categories of employees beyond those whose positions are directly targeted for elimination/restructuring (i.e., positions that are not the main focus for reduction/restructuring/elimination, but which are included in the VSIP offering only to the extent that they may provide a placement for an employee whose position will be reduced/restructured/eliminated.)

The "safe position" option assumes the employees who remain would meet the qualifications for the "safe" positions. "Safe positions" do not have to be restructured if vacated. OPM recognizes that VERA and VSIP are voluntary attrition authorities and that not every employee in a targeted position is able/wants to retire and/or resign. As with other federal workforce restructuring authorities (e.g., RIF), the agency has the ability to reassign employees to minimize the impact of its restructuring efforts.

The use of MP procedures would negate the purpose of designating a "safe position" since: the agency would be unable to limit the area of consideration to just employees whose positions were targeted for restructuring/elimination; and management has the right to select or not select from a group of certified eligibles. Also, it could be perceived V-V is being used to move people out in order to promote others.

Enjoy the weekend.

Donna

Message

From: Salgado, Omayra [Salgado.Omayra@epa.gov]
Sent: 8/8/2017 9:22:16 PM
To: Monroe, Scott [Monroe.Scott@epa.gov]
Subject: 2017 Management Review: Talking Points
Attachments: 2017 Mgmt Review SRO Talking Points v4 (002).docx

Importance: High

Scott,

I should have included this document on my previous email. Let me know if there are any questions.

Thanks, O

Message

From: Shaw, Betsy [Shaw.Betsy@epa.gov]
Sent: 5/24/2017 7:42:08 PM
To: Dunham, Sarah [Dunham.Sarah@epa.gov]
CC: Monroe, Scott [Monroe.Scott@epa.gov]
Subject: FW: OAR V-V Business Case Checklist May 24.docx
Attachments: OAR V-V Business Case Checklist May 24.docx

Hi Sarah,

The attached version reflects my edits. We're ready to send to OARM upon your signal. Let us know.

Thanks,

Betsy

Message

From: Kutzke, Julie [Kutzke.Julie@epa.gov]
Sent: 8/21/2018 12:42:46 PM
To: Monroe, Scott [Monroe.Scott@epa.gov]
Subject: FW: VERA/VSIP justification needed for the Staff Assistant, GS-0301-09/11, FPPS #18 1364340
Attachments: OAR Business Case.docx; VERA.VSIP_Backfill.Justification Staff Assistant recruit 18 1364340.docx

Looks like we'll have to fill this out since our business case included streamlining of administrative operations.

From: Brosseau, Michelle
Sent: Monday, August 20, 2018 11:04 AM
To: Kutzke, Julie <Kutzke.Julie@epa.gov>
Cc: Jackson, Amanda <jackson.amanda@epa.gov>; Crum, Kim <Crum.Kim@epa.gov>
Subject: VERA/VSIP justification needed for the Staff Assistant, GS-0301-09/11, FPPS #18 1364340

Hello Julie,

I apologize for not requesting this sooner but can you please coordinate with management and complete the attached VERA/VSIP Justification for the recruitment of the Staff Assistant, GS-0301-09/11 in the OAR, IO? Attached is the justification form.

We are required to monitor personnel actions to ensure compliance with the VERA/VSIP 2017 Business plans.

Also, attached is OAR's VERA/VSIP 2017 Business Case from 2017 for reference.

Please provide the VERA/VSIP justification as soon as possible in order to continue the recruitment process.

Thank you for your continued support and assistance.

Regards,

Michelle

Michelle Brosseau
Human Resources Specialist (Classification)
Operations Branch 1/Section 1A, OARM-RTP
U.S. Environmental Protection Agency
Research Triangle Park, NC
(919) 541-2951

Message

From: Shaw, Betsy [Shaw.Betsy@epa.gov]
Sent: 5/1/2017 5:43:08 PM
To: Monroe, Scott [Monroe.Scott@epa.gov]
Subject: Edits to narrative
Attachments: Precis OAR Buyout 2017 bs edits.docx

Swing by at your leisure to discuss and catch up on state of play generally.

Thanks,

Betsy

Message

From: Monroe, Scott [Monroe.Scott@epa.gov]
Sent: 4/26/2017 6:31:31 PM
To: Shaw, Betsy [Shaw.Betsy@epa.gov]
CC: Kutzke, Julie [Kutzke.Julie@epa.gov]; Monroe, Scott [Monroe.Scott@epa.gov]
Subject: starting point
Attachments: Precis OAR Buyout 2017.docx; OAR ALL RETIREMENT REPORT W-BREAKDOWN TAB APRIL 2017.xlsx

Hi Betsy,

Julie did some fast work – see attached Excel. (Refer to the OAR All Subgrouping tab and scroll right to see the office breakdown. This tab will neatly print on two pages.) There's a breakdown of 0300 family positions by office & eligibility. Julie can readily create a separate sheet for each OD if you like. You will notice that she included a breakout of the eligibility numbers that excludes 0301s, if you want to go that direction.

Also, I drafted a one-pager. This is set up so that each OD would select a subset of their non-supervisory 0300 jobs, tell us which positions, and then we would fill in the eligibility chart and give offers to each of them. The ODs could base their selections on certain duties, certain org units, or certain series within the 0300 family.

Ex. 5 - Deliberative Process

Scott

Precis of OAR's 2017 VERA/VSIP Proposal

Separation incentives will be offered to non-SES 0300 family positions in order to continue OAR's efforts to streamline administrative positions, achieve additional workforce efficiencies, and reduce the number of personnel with obsolete skills. Over time OAR has taken a number of steps to reshape its administrative workforce, including:

- Reorganizing work units and realigning or eliminating positions in order to consolidate mission support functions.
- Replacing positions performing non-inherently governmental clerical duties with grantees.
- Offering separation incentives to employees whose positions were identified as redundant or obsolete.

Such incremental efforts have proven effective at realizing improved customer service with fewer positions and a lower cost to payroll. Also, in recent years EPA has adopted new internet-based data systems that require analysts who are competent to use the full capability of the systems and who must be able to produce and interpret data reports. As the demands of mission support functions have evolved, OAR has found that on-the-job training is not always sufficient to enable employees to use the systems effectively, and that new skills sets are needed.

OAR consists of four program offices plus the Office of the Assistant Administrator. Each of these five units reviewed 169 positions in the 0300 family (0301, 0303, 0306, 0318, 0340, 0341, 0343, 0344), excluding SES and supervisory positions, to determine which positions are no longer a priority for achievement of the mission objectives of that office. Consideration was given to prior workforce reshaping conducted by each office. As a result of this review, OAR identified ## positions that are no longer mission critical. OAR proposes to offer buyouts to employees in these ## positions, as shown in the chart below.

OFFICE	Regular retirement w/ VSIP	VERA Eligible w/ VSIP	VSIP Eligible only	VSIP Offers
OAA				XX
OAP				XX
OAQPS				XX
ORIA				XX
OTAQ				XX
TOTAL				XX

Message

From: Collier, Darrel [collier.darrel@epa.gov]
Sent: 6/7/2017 10:05:58 PM
To: Monroe, Scott [Monroe.Scott@epa.gov]
CC: Kutzke, Julie [Kutzke.Julie@epa.gov]; Engebretson, Lizabeth [Engebretson.Lizabeth@epa.gov]; Alapati, Joan [Alapati.Joan@epa.gov]
Subject: FW: SSC LV Follow-up Re: Freeze of Targeted V/V Positions
Attachments: OAR V-V Business Case Checklist Jun 6.docx

Thank you Scott,

Based on your reply, no OAR actions need to be returned/not processed at this time.

V/R,
Darrel

Darrel W. Collier
Branch Chief, Program Operations
HRM Division – Las Vegas HR Shared Service Center (Team Vegas)
US Environmental Protection Agency, OARM-Cincinnati
4220 S Maryland Parkway, Building A, Suite 100, Las Vegas, NV 89119-7528
Office Phone: 702.646.8931 Fax: 702.798.2416 Email: collier.darrel@epa.gov

From: Monroe, Scott
Sent: Wednesday, June 07, 2017 2:37 PM
To: Collier, Darrel <collier.darrel@epa.gov>
Cc: Kutzke, Julie <Kutzke.Julie@epa.gov>
Subject: FW: SSC LV Follow-up Re: Freeze of Targeted V/V Positions

Hi Darrel,

We're not aware of any actions that should be returned given the parameters of Donna's messages yesterday and today. OAR's proposal (attached) is limited to certain positions in the 300 family. At the appropriate time we will share the names of the employees who encumber eligible positions. I assume that it will be possible to execute staffing actions for ineligible positions even if the same series and grade is referenced in our proposal, in units where not all positions in that series/grade were included as eligible.

Scott Monroe
Director of Human Resources
Office of Air and Radiation
Mail Code 6101A
Clinton North Room 5435A
tel: 202-564-1271
fax: 202-501-0600

From: Engebretson, Lizabeth
Sent: Tuesday, June 06, 2017 3:42 PM
To: Lane, Vicki <Lane.Vicki@epa.gov>; Acquisti, Heidi <Acquisti.Heidi@epa.gov>; Barber, Anthony

<Barber.Anthony@epa.gov>; Monroe, Scott <Monroe.Scott@epa.gov>; Cunningham, Dennis
<Cunningham.Dennis@epa.gov>; Torrez, Alfredo <Torrez.Alfredo@epa.gov>

Cc: Collier, Darrel <collier.darrel@epa.gov>; Taylor-Smith, Chonette <taylor-smith.chonette@epa.gov>; Alapati, Joan
<Alapati.Joan@epa.gov>; Lucero, Anthony <Lucero.Anthony@epa.gov>; Gummer, Tamara
<Gummer.Tamara@epa.gov>; Newland, Elsa <newland.elsa@epa.gov>; Castaneda, John <castaneda.john@epa.gov>
Subject: FW: SSC LV Follow-up Re: Freeze of Targeted V/V Positions

Dear Customer SSC-LV RHRO/PMO: Vicki, Anthony, Scott, Dennis and Alfredo

In light of the senior management directive received today, if your organization has any actions submitted/received in our SSC for processing that would be inappropriate to process due to potential conflict/issue with V/V-related directive, please immediately notify your servicing Chief in our SSC. We will return such actions to your requesting office. For Regions 9 and 10, please inform Chonette Taylor-Smith; for OAR, OW and OITA, please notify Darrel Collier by COB tomorrow, Wed. June 7th of any actions that need to be returned/not processed.

Note: It would be helpful for us to have additional information, when appropriate, to help ensure we are supporting your organization in accordance with the new directive. Once you are able to share a copy of your proposed plan, particularly if your plans are limited to specific organizations/positions, it will be appreciated to receive a copy/information. From prior V/V efforts in the agency, our SSCs did get a copy of the final propose/approved plans. Thank you in advance.

If you have any questions or concerns, please feel free to contact me directly at (702) 798-2432.

Regards,
Liz

Lizabeth J. Engebretson

Director, Las Vegas HR Shared Service Center
U.S. Environmental Protection Agency, OARM-Cincinnati
Human Resources Management Division – SSC Las Vegas (Team Vegas)
4220 S. Maryland Parkway, Building A, Suite 100 ♦ Las Vegas, NV 89119-7528
Phone: (702) 798-2432 ♦ Cellular Ex. 6 - Personal Privacy ♦ Fax: (702) 798-2416 ♦ Email: engebretson.lizabeth@epa.gov

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From: Showman, John

Sent: Tuesday, June 06, 2017 7:58 AM

To: Helm, Arron <Helm.Arron@epa.gov>; Carter, Rick <Carter.Rick@epa.gov>; Engebretson, Lizabeth
<Engebretson.Lizabeth@epa.gov>; Bonner, Jerome <Bonner.Jerome@epa.gov>; Taylor, Jeremy
<Taylor.Jeremy@epa.gov>; Atkinson, Ryan <Atkinson.Ryan@epa.gov>

Subject: FW: Freeze of Targeted V/V Positions

FYI

From: Vizian, Donna

Sent: Tuesday, June 06, 2017 10:39 AM

To: 2017HQfirstassistants <2017HQfirstassistants@epa.gov>; 2017Regionfirstassistants
<2017Regionfirstassistants@epa.gov>; ARA <ARA@epa.gov>; DAA-Career <DAACareer@epa.gov>; DRA <DRA@epa.gov>

Cc: Hart, Debbi <Hart.Debbi@epa.gov>; Carpenter, Wesley <Carpenter.Wesley@epa.gov>; Gray, Linda <gray.linda@epa.gov>; Hunt, Loretta <Hunt.Loretta@epa.gov>

Subject: Freeze of Targeted V/V Positions

OPM's VERA guidance requires that VERA eligible employees serve in a position for a minimum time specified by OPM (usually 30 days prior to the date of the agency request). Given the current schedule for submitting our V/V business case later this month, please be aware that movement in and out of all targeted positions through reassignments, reorganizations, etc. must cease effective immediately. The prohibition on movement in and out of targeted positions extends to VSIP targeted positions too.

Message

From: Alpert, Adina [Alpert.Adina@epa.gov]
Sent: 6/5/2017 7:37:04 PM
To: Monroe, Scott [Monroe.Scott@epa.gov]
CC: Kutzke, Julie [Kutzke.Julie@epa.gov]; Hyde, Courtney [Hyde.Courtney@epa.gov]
Subject: RE: Heads-up re: buyout
Attachments: V-V Business Case Checklist April2017_AA.docx

Here's another take. Let me know what you/they think!

Adina

From: Monroe, Scott
Sent: Monday, June 05, 2017 1:59 PM
To: Alpert, Adina <Alpert.Adina@epa.gov>
Cc: Kutzke, Julie <Kutzke.Julie@epa.gov>; Hyde, Courtney <Hyde.Courtney@epa.gov>
Subject: RE: Heads-up re: buyout

Yes! I don't know how that didn't occur to any of us from the start. Pffffttt. . .

From: Alpert, Adina
Sent: Monday, June 05, 2017 1:57 PM
To: Monroe, Scott <Monroe.Scott@epa.gov>
Cc: Kutzke, Julie <Kutzke.Julie@epa.gov>; Hyde, Courtney <Hyde.Courtney@epa.gov>
Subject: RE: Heads-up re: buyout

So, are you saying that

Table B – Estimated Savings for FY 2018 through FY 2019		
	FY 2018 Estimate	FY 2019 Estimate
A. Pre-VERA/VSIP Annual Payroll Cost	Ex. 5 - Deliberative Process	

is not for the 20 V/V people, but for the whole organization? And same for WCF?

That's some creative math.

Adina

From: Monroe, Scott
Sent: Monday, June 05, 2017 1:42 PM
To: Alpert, Adina <Alpert.Adina@epa.gov>
Cc: Kutzke, Julie <Kutzke.Julie@epa.gov>; Hyde, Courtney <Hyde.Courtney@epa.gov>
Subject: FW: Heads-up re: buyout

Adina,

We got some feedback from OHR that makes zero sense but here goes. . .

For Line A in Table B, I would need you to give me an estimate of the total annual payroll for all of OAR in FY18 and FY19. I have no idea what is an appropriate number – maybe the FY18 prez bud?

Similarly, for Line G I need an estimate for total WCF for all of OAR. Line H would then be \$180,000 (the WCF cost of the 20 V/V offers), and Line I would be the difference between the two.

Makes perfect sense, right? We would only get the savings in FY17 anyway, so why double and triple-count the savings over FY 18 & 19? Who knows. Note that we did not provide such information in our last buyout proposal.

Scott

From: Alpert, Adina
Sent: Monday, May 22, 2017 4:04 PM
To: Monroe, Scott <Monroe.Scott@epa.gov>
Cc: Kutzke, Julie <Kutzke.Julie@epa.gov>; Hyde, Courtney <Hyde.Courtney@epa.gov>
Subject: RE: Heads-up re: buyout

Here you go. Let me know if you want me to make any adjustments!

Adina

From: Monroe, Scott
Sent: Monday, May 22, 2017 3:18 PM
To: Alpert, Adina <Alpert.Adina@epa.gov>
Cc: Kutzke, Julie <Kutzke.Julie@epa.gov>; Hyde, Courtney <Hyde.Courtney@epa.gov>
Subject: RE: Heads-up re: buyout

Yes, I think this is OK, thanks. It will help to see the assumptions.

From: Alpert, Adina
Sent: Monday, May 22, 2017 1:30 PM
To: Monroe, Scott <Monroe.Scott@epa.gov>
Cc: Kutzke, Julie <Kutzke.Julie@epa.gov>; Hyde, Courtney <Hyde.Courtney@epa.gov>
Subject: RE: Heads-up re: buyout

This is what I'm estimating. What do you think?

If it looks alright to you, I'll add in my assumptions and send the document back over.

Thanks,
Adina

Table A – Direct Costs for VERA/VSIP	
# of Targeted Positions for VSIP x \$25,000	Ex. 5 - Deliberative Process
Annual Leave Pay Out for # of Targeted Positions for VERA, Optional Retirement or Resignation {Hourly rate based on the average grade and step of the targeted pool x 240 x # of Targeted Positions}	
Total Maximum Direct Costs	

Table B – Estimated Savings for FY 2018 through FY 2019		
	FY 2018 Estimate	FY 2019 Estimate
A. Pre-VERA/VSIP Annual Payroll Cost	Ex. 5 - Deliberative Process	
B. VERA/ VSIP Payout Cost		
C. Leave Payout Cost		
D. Post VERA/VSIP Annual Payroll Cost		
E. Payroll for # New Hires		
F. Payroll Savings for # VERA/VSIP Targeted Positions (F = A – B – C – D - E)		
G. Pre-VERA/VSIP Annual WCF Cost		
H. Post VERA/VSIP Annual WCF Cost		
I. WCF for # New Hires		
J. WCF Savings for # VERA/VSIP Targeted Positions (J = G – H – I)		
Projected Savings with VERA/VSIP (F + J)		

From: Monroe, Scott
Sent: Monday, May 22, 2017 11:00 AM
To: Alpert, Adina <Alpert.Adina@epa.gov>
Cc: Kutzke, Julie <Kutzke.Julie@epa.gov>; Hyde, Courtney <Hyde.Courtney@epa.gov>
Subject: Re: Heads-up re: buyout

Hi,
 Assume we hire back 5 positions (25%).
 Err on the high end.
 Yes, zero. I have idea what that item is for!

Sent from my iPhone

On May 22, 2017, at 10:23 AM, Alpert, Adina <Alpert.Adina@epa.gov> wrote:

Hi Julie,
 I have a few clarifying questions:

- How many new hires should I calculate? I would assume any of them would be lower graded.
- Would you prefer a lump sum payout estimate that's higher or more realistic to the number of hours of the OAR positions targeted?
- There's a line for "Post VERA/VSIP Annual Payroll Cost" for the VV employees. Logic leads me to conclude that's \$0, but I just wanted to be sure I wasn't misunderstanding.

Based on your suggestion, I will do a run that looks at OTAQ differently and see how much the numbers change.

Thanks,
 Adina

From: Kutzke, Julie
Sent: Monday, May 22, 2017 9:52 AM
To: Alpert, Adina <Alpert.Adina@epa.gov>

Cc: Monroe, Scott <Monroe.Scott@epa.gov>; Hyde, Courtney <Hyde.Courtney@epa.gov>

Subject: RE: Heads-up re: buyout

The 20.... Since that's the max number of buyouts.

The 67 is the pool of eligibles.. Last time, I'm thinking you must have averaged the data on their salary and annual leave to develop the estimates.

From: Alpert, Adina

Sent: Monday, May 22, 2017 9:49 AM

To: Kutzke, Julie <Kutzke.Julie@epa.gov>

Cc: Monroe, Scott <Monroe.Scott@epa.gov>; Hyde, Courtney <Hyde.Courtney@epa.gov>

Subject: RE: Heads-up re: buyout

Gotcha! Am I using the 67 number or the 20?

Adina

OAA
OAP
OAQPS
OTAQ
ORIA

Eligible

Offers

Ex. 5 - Deliberative Process

From: Kutzke, Julie

Sent: Monday, May 22, 2017 8:39 AM

To: Alpert, Adina <Alpert.Adina@epa.gov>

Cc: Monroe, Scott <Monroe.Scott@epa.gov>; Hyde, Courtney <Hyde.Courtney@epa.gov>

Subject: RE: Heads-up re: buyout

The budget estimates on Page 2 of this document

From: Alpert, Adina

Sent: Monday, May 22, 2017 8:34 AM

To: Kutzke, Julie <Kutzke.Julie@epa.gov>

Cc: Monroe, Scott <Monroe.Scott@epa.gov>; Hyde, Courtney <Hyde.Courtney@epa.gov>

Subject: RE: Heads-up re: buyout

Forgive my addled brain, but remind me what you need? I am teleworking today before heading down to RTP.

Thanks,
Adina

From: Kutzke, Julie

Sent: Thursday, May 18, 2017 4:54 PM

To: Alpert, Adina <Alpert.Adina@epa.gov>

Cc: Monroe, Scott <Monroe.Scott@epa.gov>; Hyde, Courtney <Hyde.Courtney@epa.gov>

Subject: FW: Heads-up re: buyout

This may help you figure out what we will presumably still need to submit next week re: the budget estimation information.

From: Alpert, Adina

Sent: Monday, May 15, 2017 8:40 AM

To: Monroe, Scott <Monroe.Scott@epa.gov>

Cc: Hyde, Courtney <Hyde.Courtney@epa.gov>; Kutzke, Julie <Kutzke.Julie@epa.gov>

Subject: RE: Heads-up re: buyout

Thanks for the info. If the offices are able to provide the divisions, I could figure out the EPM/S&T splits. I read "location" below as the physical location, but if it means division or even branch, then we're all set.

And this is yet another example of OCFO and OARM not really understanding the many facets of payroll management. Can you even imagine how this exercise will go under PCA?

Adina

From: Monroe, Scott

Sent: Friday, May 12, 2017 4:47 PM

To: Alpert, Adina <Alpert.Adina@epa.gov>

Cc: Hyde, Courtney <Hyde.Courtney@epa.gov>; Kutzke, Julie <Kutzke.Julie@epa.gov>

Subject: Heads-up re: buyout

Hi Adina,

Julie and I will need your help next week to fill out the attached spreadsheet. OARM just threw us a bit of curveball (Friday special!) by asking for the spreadsheet by 5/19 AND by adding a wrinkle where they want us to identify eligible positions according to S&T vs. EPM. Also, by 5/24 we've been asked to provide a narrative (see Word file) that contains the direct costs PLUS estimated costs across FY18 and FY19. At the moment I'm more concerned with the spreadsheet.

I've asked the Planning Officers to send me their numbers by Wednesday. They will tell me which positions (series, grade, location) they are treating as eligible. What information do you need in order to discern the related appropriation – i.e., do you need to know the employee name? Or should I just ask the Planning Officers to tell me whether the target position is charged to S&T or EPM? (And do we have positions charged to multiple appropriations, as indicated in the spreadsheet?) Please advise.

Thanks,
Scott

Message

From: Monroe, Scott [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=E2C66D1CB877417DB50C4F90B30AD2CA-SMONROE]
Sent: 5/23/2017 5:17:08 PM
To: Shaw, Betsy [Shaw.Betsy@epa.gov]
CC: Kutzke, Julie [Kutzke.Julie@epa.gov]
Subject: FW: OAR V-V Business Case
Attachments: OAR V-V Business Case Checklist May 22.docx; OAR Targeted Positions Template from OHR).xlsx

Betsy, I'm including here the spreadsheet that maps out the eligible positions by location. (It's not printable.) I wouldn't say it bears scrutiny. OHR asked us to designate "maximum offers" per series and location, which doesn't make sense for us but we went ahead and distributed the 20 positions figuring that we'd be called on it if we didn't. Also, OHR asked that we indicate which positions would be eliminated vs. "restructured." We erred in favor of restructuring.

Call me if you have ?s.

Scott

From: Monroe, Scott
Sent: Monday, May 22, 2017 5:38 PM
To: Shaw, Betsy <Shaw.Betsy@epa.gov>
Cc: Kutzke, Julie <Kutzke.Julie@epa.gov>
Subject: OAR V-V Business Case

Hi Betsy,

Attached for your review is our draft V/V proposal, including Adina's input. I suggested that she assume that, if 20 offers are made and accepted, OAR backfills only 5 of them with people not already on OAR's payroll. She'll be on travel tomorrow, so if you don't like that assumption it may be that Julie and I can rejigger the numbers in her absence.

Julie and I will finish the accompanying spreadsheet tomorrow morning and review it with you in the afternoon.

Scott

Message

From: Monroe, Scott [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=E2C66D1CB877417DB50C4F90B30AD2CA-SMONROE]
Sent: 6/21/2017 7:01:30 PM
To: Dunham, Sarah [Dunham.Sarah@epa.gov]
CC: Shaw, Betsy [Shaw.Betsy@epa.gov]
Subject: Draft talking points and Q&A
Attachments: AA Talking Points - VERA and VSIP Town Hall Meetings.docx; Q&A on prelim anncmt~AA.docx

Hi Sarah,

We've prepped two different documents for you: (1) the talking points that you already reviewed, which we've revised per your comments, and (2) Q&A covering a range of possible inquiries.

Separately, we have a similar document to share with ODs and their planning officers for the one-on-one conversations that may follow the all-hands meetings. Let me know if you want to see that, too. (It's derived from your documents.)

Scott

Message

From: Monroe, Scott [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=E2C66D1CB877417DB50C4F90B30AD2CA-SMONROE]
Sent: 6/21/2017 2:09:32 PM
To: Shaw, Betsy [Shaw.Betsy@epa.gov]
CC: Kutzke, Julie [Kutzke.Julie@epa.gov]
Subject: draft Q&A
Attachments: OD Talk Pts and Q&A on prelim anncmt.docx; Q&A on prelim anncmt~AA.docx

Hi Betsy,

Happy COOP Day to you. I'm sending two files: (1) Q&A for Sarah, (2) Talking Points plus Q&A for the ODs & planning officers. The OD document has abbreviated versions of Sarah's talking points and Q&A.

Scott

Message

From: Monroe, Scott [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=E2C66D1CB877417DB50C4F90B30AD2CA-SMONROE]
Sent: 5/2/2017 1:33:51 PM
To: Shaw, Betsy [Shaw.Betsy@epa.gov]
Subject: RE: Edits to narrative
Attachments: Precis OAR Buyout 2017.docx

Here's a new version for senior staff meeting.

From: Shaw, Betsy
Sent: Monday, May 01, 2017 1:43 PM
To: Monroe, Scott <Monroe.Scott@epa.gov>
Subject: Edits to narrative

Swing by at your leisure to discuss and catch up on state of play generally.

Thanks,

Betsy

Message

From: Monroe, Scott [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=E2C66D1CB877417DB50C4F90B30AD2CA-SMONROE]
Sent: 6/20/2017 6:37:43 PM
To: Shaw, Betsy [Shaw.Betsy@epa.gov]
Subject: Revised talking points
Attachments: OAR Talking Points - VERA and VSIP Town Hall Meetings june 22.docx

Betsy, please review this file instead of the one I sent earlier. I left out any mention of highly-graded positions as a target; relatively fewer positions were tied to that theme.

S

Message

From: Monroe, Scott [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=E2C66D1CB877417DB50C4F90B30AD2CA-SMONROE]
Sent: 4/19/2017 3:24:27 PM
To: Shaw, Betsy [Shaw.Betsy@epa.gov]
Subject: draft V/V email
Attachments: Targeted Positions Template .xlsx; VERA-VSIP Overview Presentation April2017.pptx; V-V Business Case Checklist April2017final.docx; Guiding Questions OAR April 2017.docx

Betsy,

I didn't include attrition or ceiling info here, figuring that ODs will prefer to rely on their Planning Officers. I tried to consolidate the other points we discussed (such as OMB's considerations) into the "guiding questions" attachment. I'm not leaving until 4:00 if you want revisions. . .

Scott

To Chris, Jonathan, Reid, and Steve,

As we discussed, Mike and Donna have asked each Region and AAsip to consider a VERA/VSIP proposal in response to direction from OMB. Here is a link to OMB's memo:

<https://www.whitehouse.gov/sites/whitehouse.gov/files/omb/memoranda/2017/M-17-22.pdf>

I am planning to speak with each of you on Monday about your office's situation. I would ask that you consider both the short-term potential for program and payroll cuts as well as whether workforce restructuring in the near future would help position your office in the longer term.

Attached are items that may help to organize your thinking. OHR has provided an OAR-wide listing (also attached) of eligible employees organized by geographic location, and we hope to give you an office-level listing soon. In the meantime, contact me or Scott if you have questions about VERA/VSIP.

Betsy